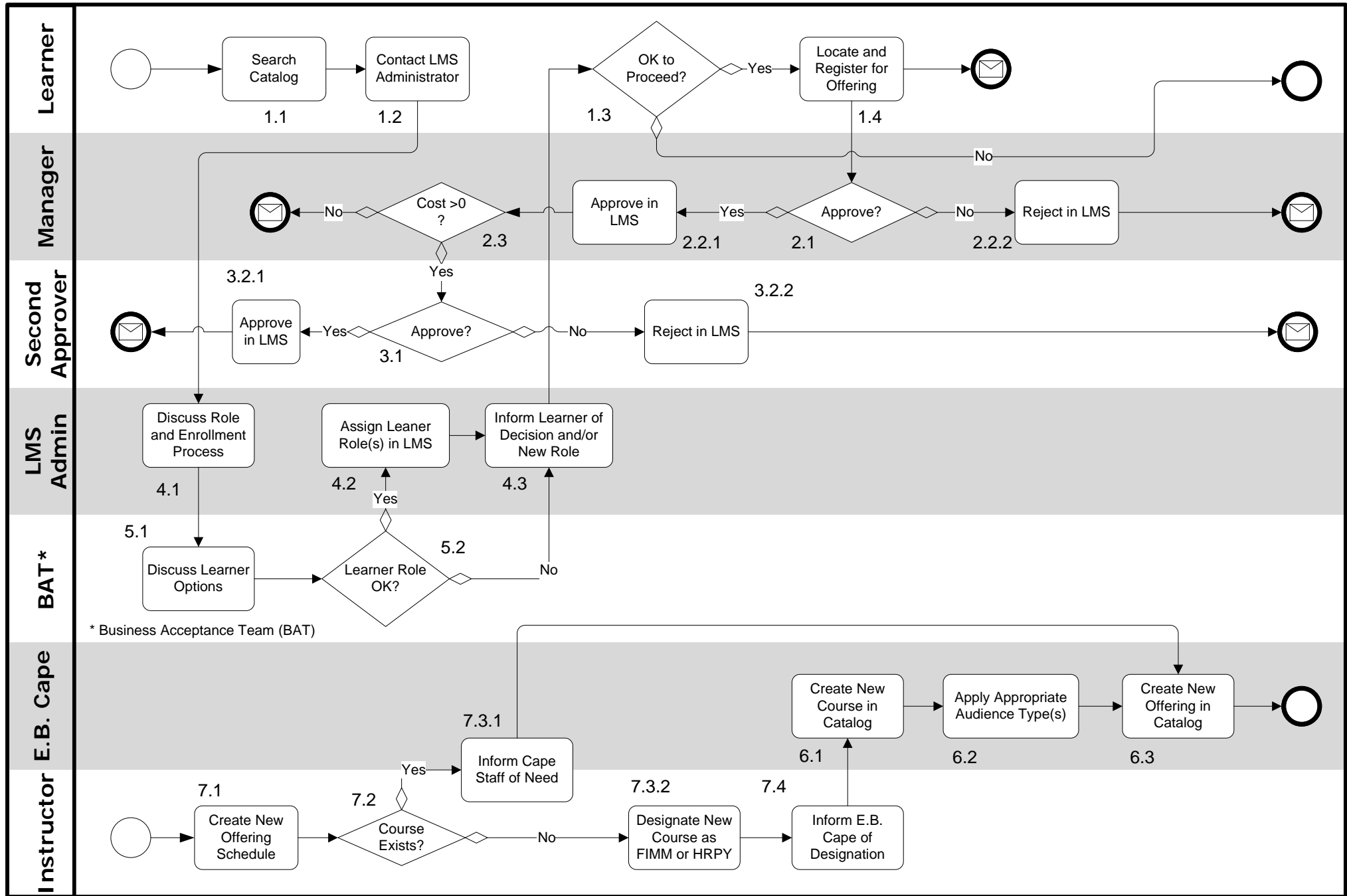


City of Houston – SAP Registration and Catalog Process



Narrative for SAP Registration and Catalog Process

Purpose

This document provides a narrative description for the flow chart illustration of the proposed SAP registration and catalog maintenance process. It describes the interaction of all functional roles involved in the process, and it references supporting documents, such as Job Aids, which provide additional step-by-step instructions for performing activities.

Learner Activities

- 1.1 When the learner searches the LMS Knowledge Center for information about SAP courses and offerings, he or she will see a single course called SAP Registration Information. That course has no offerings, but rather has a description of the process, including a link to this process map and narrative. The description also instructs the learner to discuss the registration with his or her LMS Administrator.
- 1.2 The learner contacts the LMS Administrator for his or her department. Names of the departmental LMS Administrators can be found in the Outlook Global Address List under the distribution group called LMS Departmental Administrators.
- 1.3 After the LMS Administrator has informed the learner of the decision of the Business Approval Team (BAT), the learner either proceeds to step 1.4 Locate and Register for Offering, or the process ends.
- 1.4 Assuming that the decision of the BAT was to allow the learner to register, the learner goes back to the LMS Knowledge Center to search for an appropriate offering of the SAP course(s) that correspond to the role(s) assigned in step 4.2. An automated notification is generated when the learner registers for the course offering, requesting approval from his or her manager. (See Job Aid: Register for an Instructor-Led Course Offering.)

Manager Activities

- 2.1 After the learner selects and registers for an SAP course, the learner's manager receives an automated notification, requesting approval for the registration. The manager is required to approve the employee's time that will be spent in the course offering. This approval happens in the LMS. Based on the manager's decision, the process flow moves either to step 2.2.1 or 2.2.2, depending on whether the registration request was approved or rejected.
 - 2.2.1 If the manager agrees to allow the learner to participate in the course, he or she logs into the LMS, goes to the Team Dashboard view, locates the request for approval in the Team Enrollments section and approves the registration request. (See Job Aid: Approve a Registration Request.)
 - 2.2.2 If the manager does not agree to allow the learner to participate in the course, he or she logs into the LMS, goes to the Team Dashboard view, locates the request for approval in the Team Enrollments section and rejects the registration request. The LMS sends an automated notification to the learner, stating that the manager rejected the request. (See Job Aid: Approve a Registration Request.)
- 2.3 If there is a cost associated with the course offering, the LMS will send an automated notification to the Additional Approver (Second Approver) assigned to the learner, based on his or her cost center. If there is no cost associated with the course offering, the LMS sends a notification to the learner that his or her manager has approved the registration request.

Additional Approver (Second Approver) Activities

- 3.1 The role of the Additional Approver is to verify that there are ample funds in GL Account #520805 and to release those funds as appropriate. If there are not ample funds, the decision must be made to reject the request. If there are sufficient funds, there still may be reasons why the request could be rejected. Regardless of these reasons, the Additional Approver will either approve or reject the request, following steps 3.2.1 or 3.2.2 as appropriate.
- 3.2.1 If the Additional Approver agrees to release the funds, he or she logs into the LMS, goes to the My Learning tab, checks the Approvals Inbox and approves the registration request. The LMS sends an automated notification to the learner and his or her manager, notifying them of the decision. (See Job Aid: Perform Additional Approver Role.)
- 3.2.2 If the Additional Approver does not agree to release the funds, he or she logs into the LMS, goes to the My Learning tab, checks the Approvals Inbox and rejects the registration request. The LMS sends an automated notification to the learner and his or her manager, notifying them of the decision.

LMS Administrator Activities

- 4.1 When the Learner contacts the LMS Administrator to discuss the SAP registration process, the LMS Administrator mentions that prior to taking any specialized SAP course, the learner must take the SAP Overview course. In order for a learner to see the offerings for the SAP courses, he or she must be approved by the Business Approval Team (BAT) in one or both of the potential SAP role families (i.e., FI/MM or HR/PY).
- 4.2 After the Business Approval Team (BAT) agrees to allow the learner to be assigned to either or both of the SAP role families, the LMS Administrator assigns the associate Audience Type(s) in the LMS. (See Job Aid titled: Assign Audience Type to Person.)
- 4.3 After assigning the proper Audience Type(s) in the LMS, or after learning from the Business Approval Team (BAT) that the learner has not been approved for either of the SAP role families, the LMS Administrator contacts the Learner and informs him or her of the decision. If the BAT approved the learner, the LMS Administrator tells the learner what to expect when he or she searches the Knowledge Center for SAP course offerings (e.g., if assigned the FIMM audience type, the learner will see only the courses associated with that particular role family).

Business Approval Team (BAT) Activities

- 5.1 When the LMS Administrator contacts the appropriate Business Approval Team (BAT) representative to discuss the specific SAP registration request from the learner, the BAT representative may need to contact the learner, the learner's manager or others as needed to ensure that there is an appropriate business case for the learner to be assigned one of both of the role families prior to taking the SAP Overview course.
- 5.2 Depending on a variety of department-specific factors, the decision may be very easy or very difficult. Regardless of which decision is made, the BAT representative communicates the decision to the LMS Administrator.

E.B Cape Activities (Catalog Administration)

- 6.1 If the course does not yet exist in the LMS, the Catalog Administrators at E.B. Cape will create it. The course will be created with the appropriate Delivery Type (e.g., Instructor-Led), security domain (e.g., Common – visible to all departments) and course code. Any other needs, such as a cost, variation from the standard business rules for approvals (i.e., manager approval required for all courses and additional approval required for courses with cost greater than 0\$), will be addressed as needed. (See Job Aid: Create New Course.)
- 6.2 Based on the classification of the new course by the ERP Instructor, the Cape Center will also apply the appropriate audience type to the course. This audience type will, in turn, be inherited by all subsequent offerings of the course. (See Job Aid: Apply Audience Type to Course.)
- 6.3 If the course already exists in the system, or after it has been created in the two previous steps, an offering will be created. At present, all SAP course offerings use the Instructor-Led delivery type, but other delivery types (e.g., Virtual Course, Video on Demand, etc.) may apply in the future. Assuming it is an Instructor-Led course, the offering will include the date, time, location (including room) and may also include the assignment of an appropriate instructor. (See Job Aid: Create New Offering for Existing Course.)

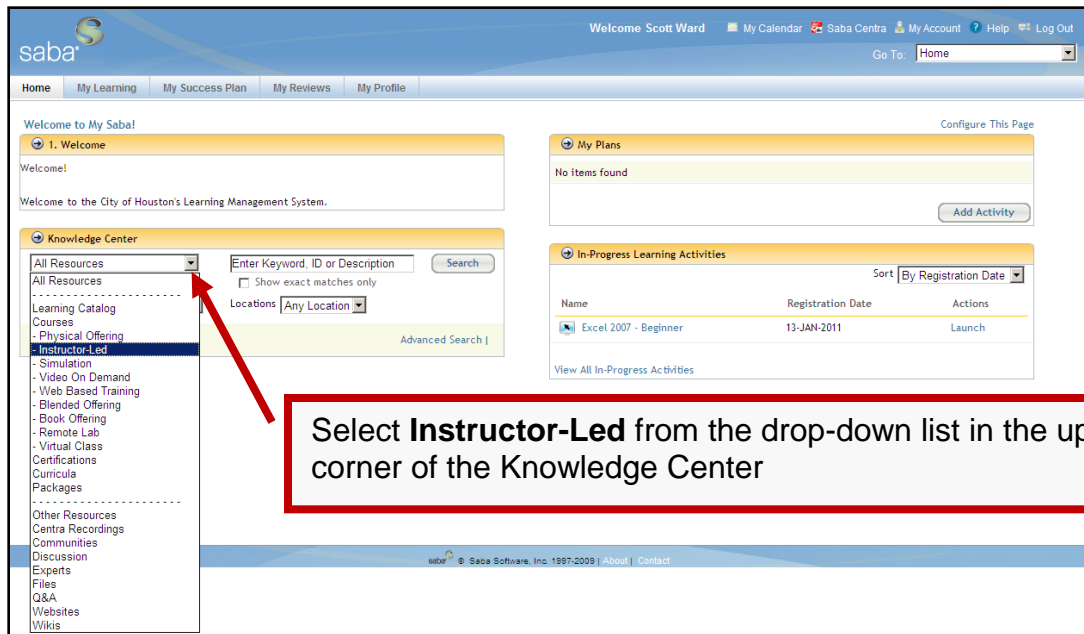
Instructor Activities

- 7.1 When the Instructor has a new course, or a new offering date for an existing course, he or she creates a schedule, indicating the dates, times and locations in which the course offerings will be delivered.
- 7.2 If the course is new (i.e., has never been delivered before), additional steps 7.3 and 7.4 need to be followed; otherwise, the cataloging process ends for the Instructor.
 - 7.3.1 If the course already exists, the Instructor needs to notify the Cape Center staff to let them know of the need for one or more new offerings of the existing course.
 - 7.3.2 For a new course, the Instructor first needs to identify whether the course fits better in the FI/MM role family or the HR/PY role family.
- 7.4 After determining the designation of the role family, the Instructor needs to communicate the designation to the Cape Center Catalog Administrators to ensure that the proper audience type is applied. The instructor would also communicate the need for any scheduled offerings of the new course.

LMS Job Aid: Register for an Instructor-led Course Offering

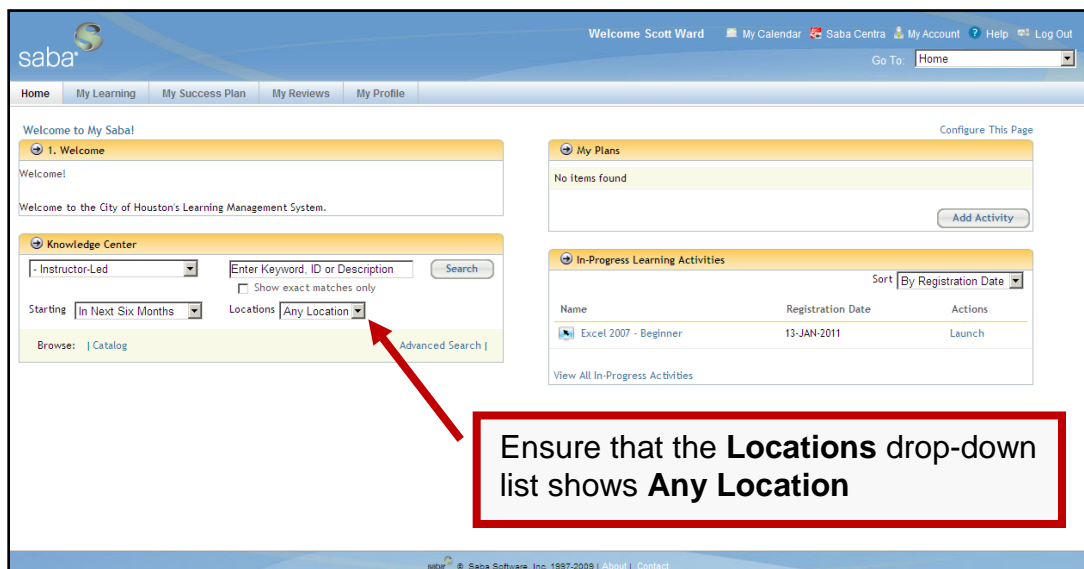
The purpose of this job aid is to show you how to register for an Instructor-led course offering.

1. Log into the LMS.
2. From the **Home** tab, locate the **Knowledge Center** portlet. Select the Instructor-Led option from the drop-down list in the upper-left corner of the Knowledge Center.



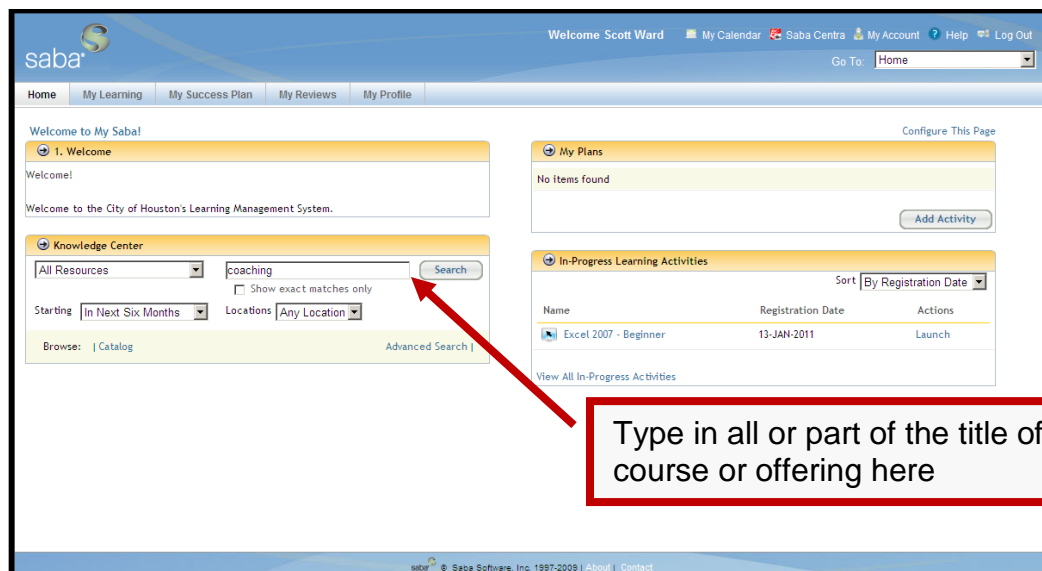
Select **Instructor-Led** from the drop-down list in the upper-left corner of the Knowledge Center

3. Ensure that the **Locations** drop-down list is set to show **Any Location**.

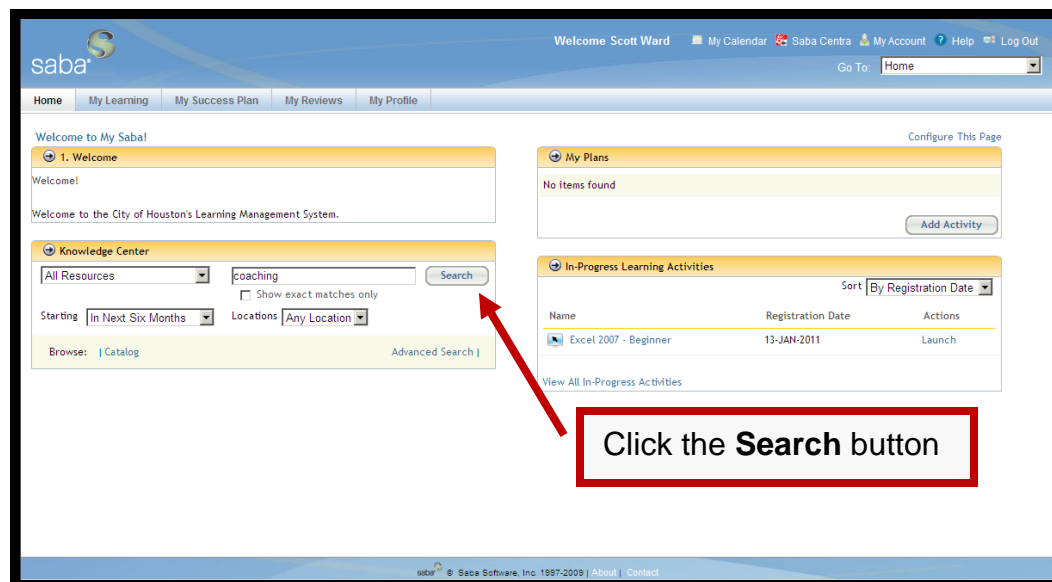


Ensure that the **Locations** drop-down list shows **Any Location**

4. In the field to the left of the Search button, type in all or part of the title of the course or offering. In this case, we are looking for a course called Coaching, Modeling and Mentoring, so we'll just enter "Coaching" in the search field.



5. Click the Search button to start your search.



6. First, note that the system has moved you to the My Learning tab. The courses and offerings matching the search term you entered are shown here.

The screenshot shows the Saba LMS interface. The top navigation bar includes 'Home', 'My Learning' (highlighted with a red box), 'My Success Plan', 'My Reviews', and 'My Profile'. The 'My Learning' tab is active. The left sidebar contains links like 'In-Progress Learning', 'Knowledge Center', 'Search', 'Browse Catalog', 'All Learning Activity', 'Learning Requests', 'Approvals Inbox', and 'Evaluations & Surveys'. The main content area shows search results for 'coaching, modeling'. The search bar contains 'coaching, modeling' and the 'Search' button is clicked. The results show two offerings of the course 'Coaching, Modeling and Mentoring' (00001421) and (00001732). Each offering includes details like 'Offered As: Instructor-Led', 'Price: 35.00 USD', 'Start Date', 'End Date', 'Sessions', 'Location', 'Language', 'Duration', and 'Seat Count'. The first offering has a seat count of 20, and the second has a seat count of 19. A red bracket on the left side of the offerings is labeled 'Courses and offerings matching your search term'. A red box on the right side of the interface is labeled 'Notice that you are now on the My Learning tab'.

7. Be sure to read the information on Seat Count. A Seat Count number of 0 indicates that all seats are currently taken.

This is a close-up view of the search results for 'Coaching, Modeling and Mentoring'. It shows two offerings. The first offering (00001421) has a 'Seat Count: 20'. The second offering (00001732) has a 'Seat Count: 19'. A red bracket on the right side of the offerings is labeled 'These two offerings of the course: Coaching, Modeling and Mentoring still have seats available'.

8. Let's assume you want to go to the session on Tuesday, April 26. To find out the start time for the session, click the Tuesday link.

Sort by: Relevance 10 results per page

Coaching, Modeling and Mentoring (00001421)

This course focuses on the invaluable traits of an effective coach, the creation of a powerful action plan, and providing innovative leadership for successful outcomes; proven modeling tips and con ...

Offered As: Instructor-Led Price: 35.00 USD

Start Date: 26-APR-2011 End Date: 26-APR-2011

Sessions: [Tuesday](#) Location: E.B. Cape Center

Language: English

Duration: 07:00 Seat Count: 20

[Register](#) | [Add to Plan](#) | [Request Private Offering](#) | [Request Public Offering](#)

Coaching, Modeling and Mentoring (00001732)

This course focuses on the invaluable traits of an effective coach, the creation of a powerful action plan, and providing innovative leadership for successful outcomes; proven modeling tips and con ...

Offered As: Instructor-Led Price: 35.00 USD

Start Date: 18-MAY-2011 End Date: 18-MAY-2011

Sessions: [Wednesday](#) Location: E.B. Cape Center

Language: English

Duration: 08:00 Seat Count: 19

[Register](#) | [Add to Plan](#) | [Request Private Offering](#) | [Request Public Offering](#)

Click the **session** link to see the start and end times for the desired session

9. On the Session Detail window, note the starting and ending times for the offering, as well as the listings under the Instructor and Room section. If you are at your own computer, you may choose to export the event to your Outlook calendar. Otherwise, click the Close button to close the window.

Saba - Windows Internet Explorer

http://lms.coh.gov/Saba/Web_vdk/Main/learning/sessionTemplateDetailPopup.rdf?offeringId=class0000000000001182&isInstructc

Session Detail: Coaching, Modeling and Mentoring

Session Detail [Print](#) | [Export](#) | [Modify Table](#)

Session Name	Date	Start	End	Instructor and Room
Session 1	26-APR-2011	08:30	16:30	Primary Classroom: EBC-222

Note: All times are in (GMT-06:00) Central Time (US & Canada).

[Export to Calendar](#) [Close](#)

NOTE: You must be on your own computer to use the Export to Calendar feature

Click the **Close** button to close the window

10. When you're satisfied that this is the offering you want to attend for this course, click the Register link.

Sort by: Relevance 10 results per page

Coaching, Modeling and Mentoring (00001421)

This course focuses on the invaluable traits of an effective coach, the creation of a powerful action plan, and providing innovative leadership for successful outcomes; proven modeling tips and con ...

Offered As: Instructor-Led Price: 35.00 USD

Start Date: 26-APR-2011 End Date: 26-APR-2011

Sessions: [Tuesday](#) Location: E.B. Cape Center

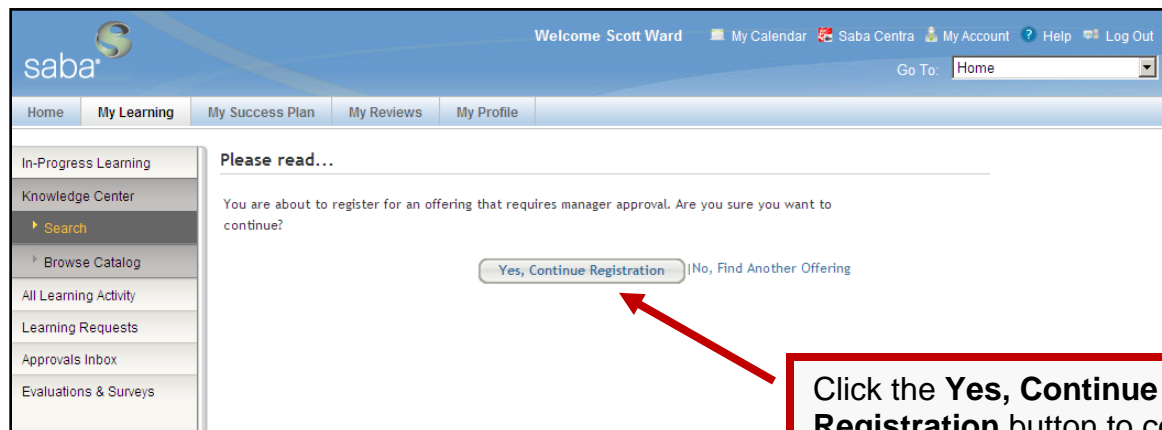
Language: English

Duration: 07:00 Seat Count: 20

[Register](#) | [Add to Plan](#) | [Request Private Offering](#) | [Request Public Offering](#)

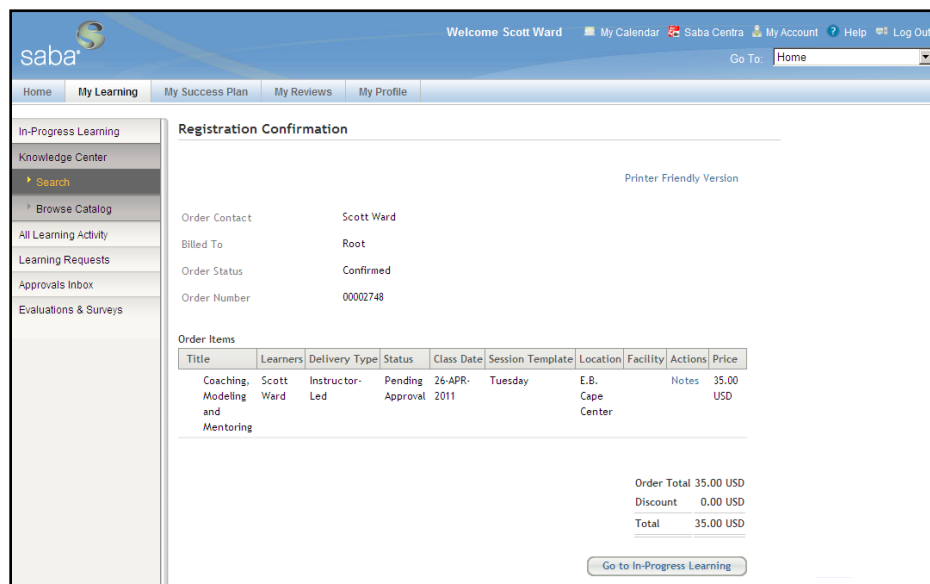
Click the **Register** link to register for the course offering

11. When you click the Register link a screen displays, stating that the offering requires the approval of your manager. Most, if not all, courses in the LMS require you to have your manager's approval for the course. This is because your manager or supervisor is the person responsible for your time on the job. If you're fairly certain that your manager would allow you to attend this training event during your regular working hours, click the **Yes, Continue Registration** button.

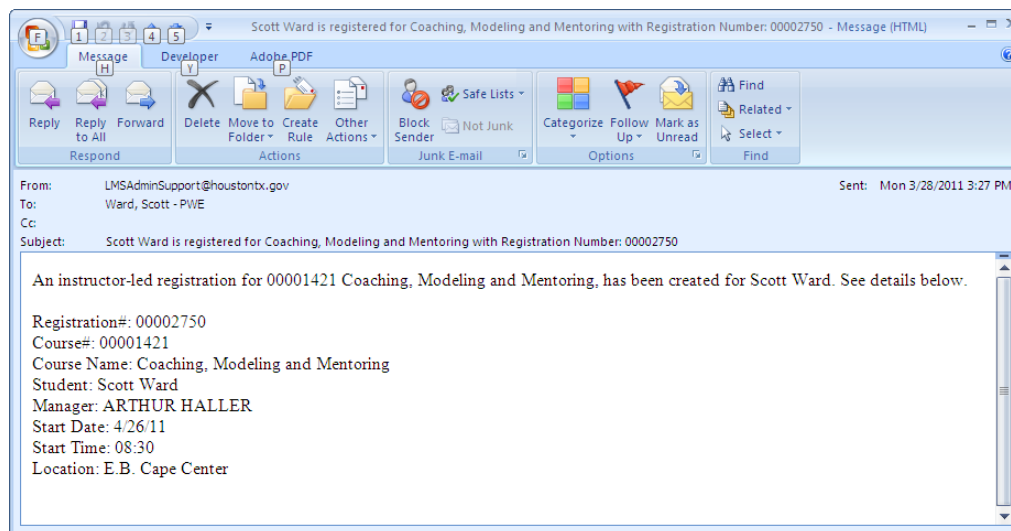


Click the **Yes, Continue Registration** button to complete your registration request

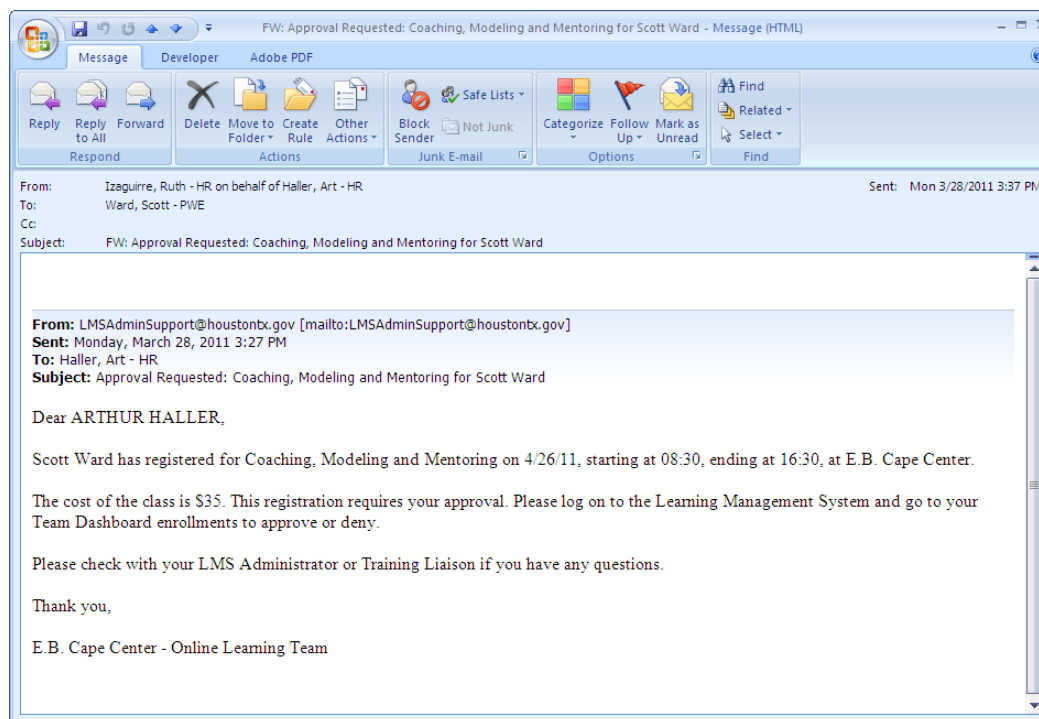
12. After you click the button in the screen above, a Registration Confirmation screen displays. It shows the Order Status as Confirmed, the Order Number and the price of the course offering. Also note that the Status is shown as Pending Approval in the Order Items table. This means that your manager still needs to approve your request before you attend the course offering.



13. You will also receive an e-mail notification that your order was processed.



14. Your manager will also receive an e-mail with the details of the registration request.



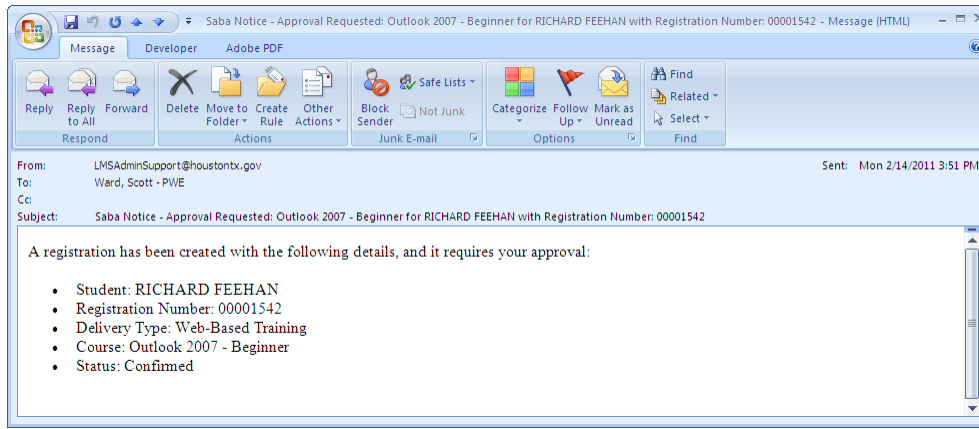
15. When your manager approves or rejects your registration request, you will receive an -email with the results of the decision. Also note that, depending on whether or not there is a dollar cost associated with the training activity, additional approval beyond your manager or supervisor may be necessary.

END OF PROCEDURE

LMS Job Aid: Approve a Registration Request

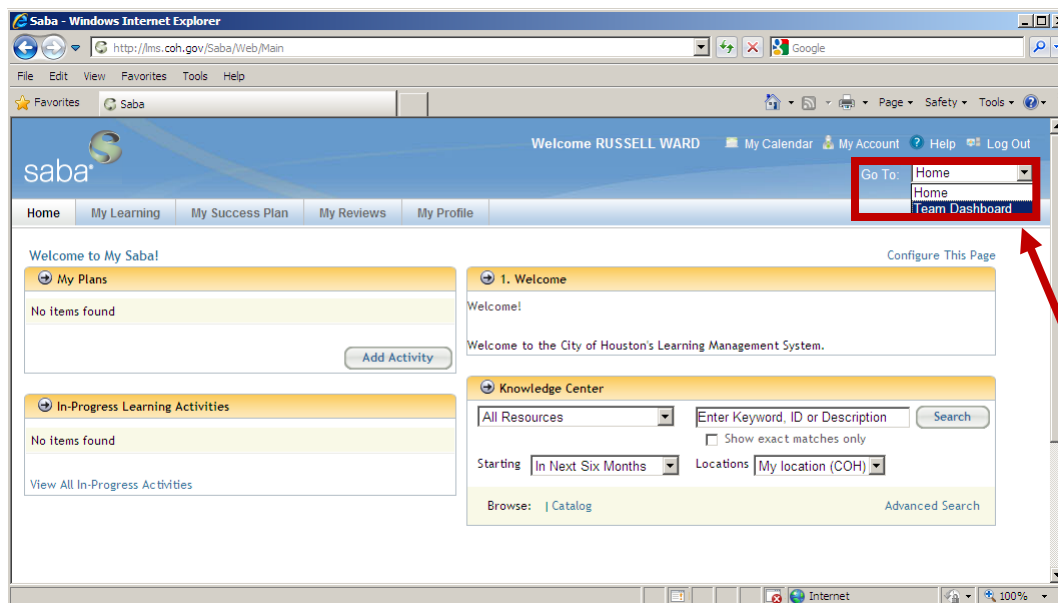
The purpose of this job aid is to show you how to approve a request for registration in a course offering.

1. Receive e-mail notification regarding registration request in Outlook. Take note of the name of the employee requesting the registration and the name of the course offering being requested.



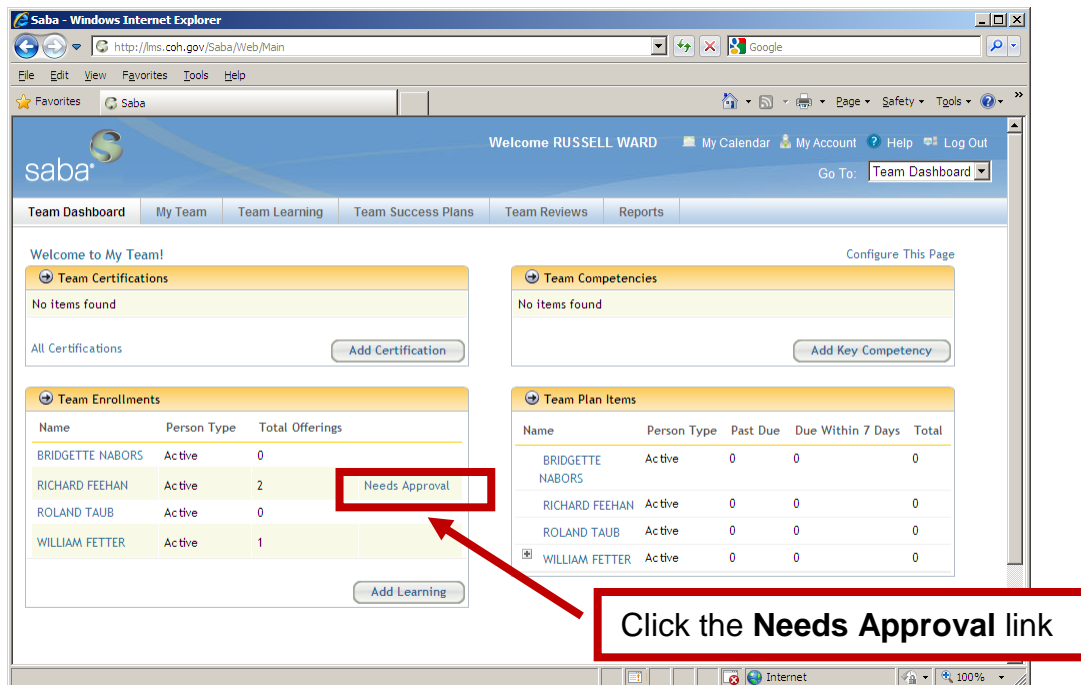
IMPORTANT NOTE:
The e-mail notification messages from the LMS are generated automatically. Therefore, **DO NOT** reply to these e-mails.

2. Log into the LMS.
3. Select **Team Dashboard** from the **Go To:** roles drop-down list in the top right corner of the screen



Select **Team Dashboard** from the **Go To:** drop-down box

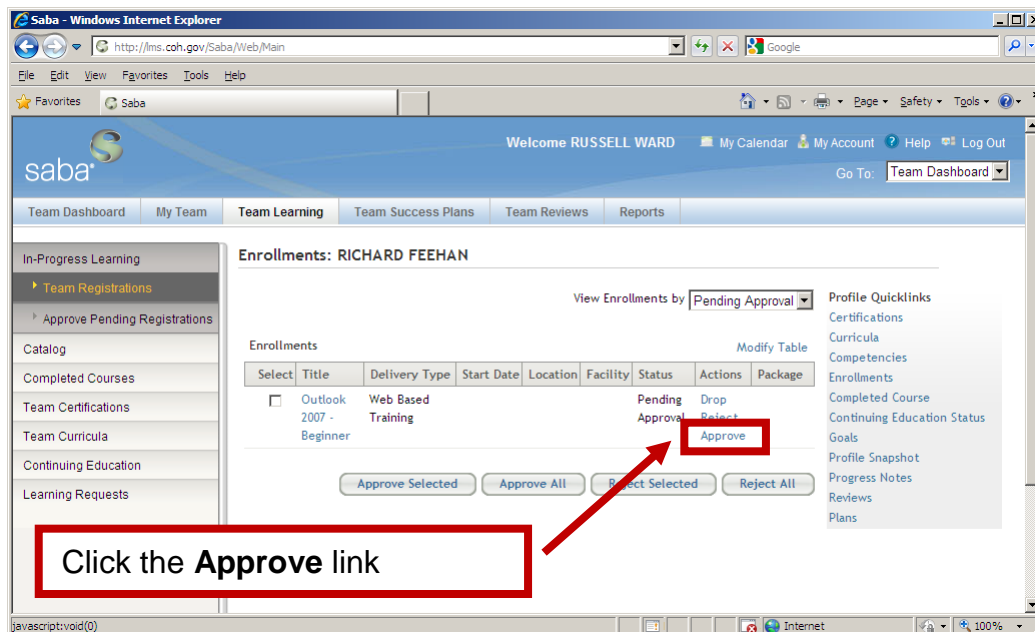
- Click the **Needs Approval** link for the employee who requested the registration.



The screenshot shows the Saba LMS interface in Internet Explorer. The user is logged in as RUSSELL WARD. The 'Team Dashboard' is active, showing sections for Team Certifications, Team Enrollments, Team Competencies, and Team Plan Items. In the 'Team Enrollments' table, Richard Feehan's record is highlighted, and a red box highlights the 'Needs Approval' link. A red arrow points from this link to a text box that says 'Click the Needs Approval link'.

Name	Person Type	Total Offerings
BRIDGETTE NABORS	Active	0
RICHARD FEEHAN	Active	2
ROLAND TAUB	Active	0
WILLIAM FETTER	Active	1

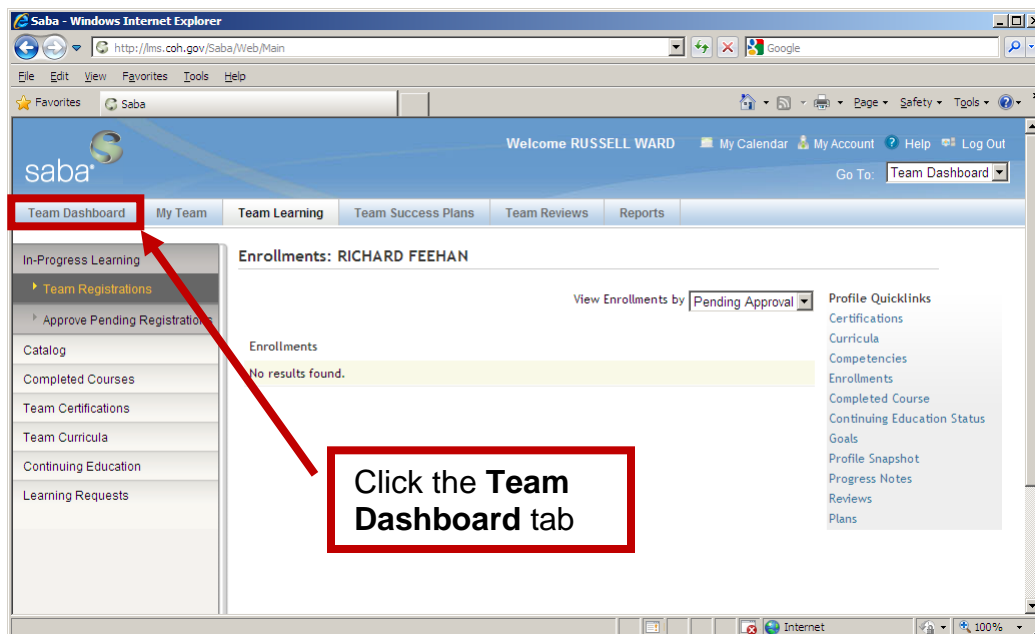
- Click the **Approve** link for the requested enrollment.



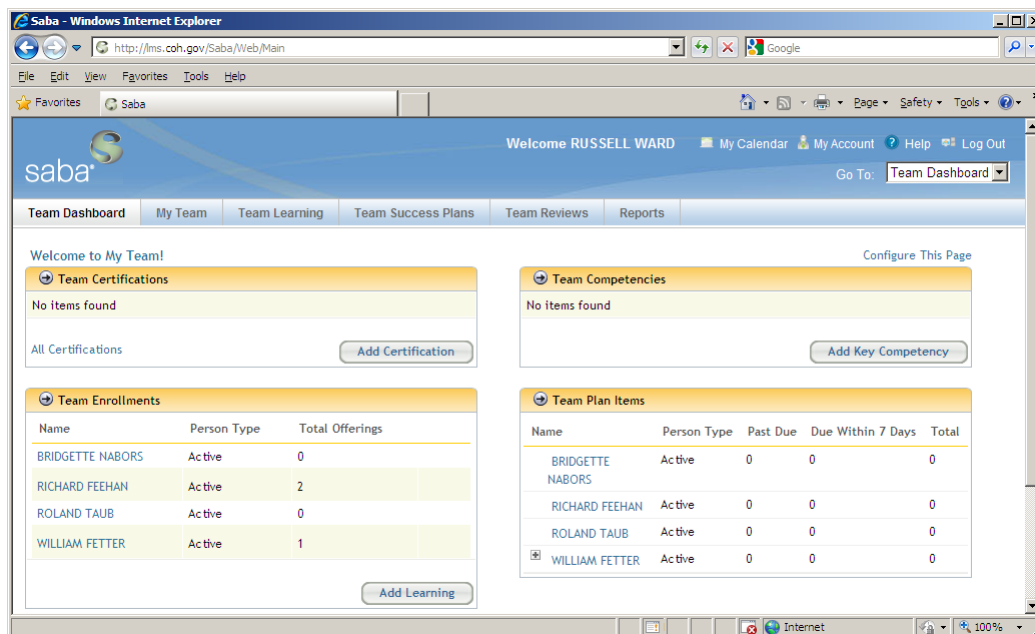
The screenshot shows the 'Enrollments: RICHARD FEEHAN' page. The 'View Enrollments by' dropdown is set to 'Pending Approval'. A table lists enrollments, with the first row for 'Outlook 2007 - Beginner' highlighted. A red box highlights the 'Approve' link in the 'Actions' column. A red arrow points from this link to a text box that says 'Click the Approve link'.

Select	Title	Delivery Type	Start Date	Location	Facility	Status	Actions	Package
<input type="checkbox"/>	Outlook 2007 - Beginner	Web Based Training				Pending Approval	Drop Approve	

6. When the Enrollments screen returns, it is now empty. Click the Team Dashboard tab.



7. Note that the Needs Approval link seen in step number 4 no longer appears.



END OF PROCEDURE

LMS Job Aid: Perform Additional Approver Role

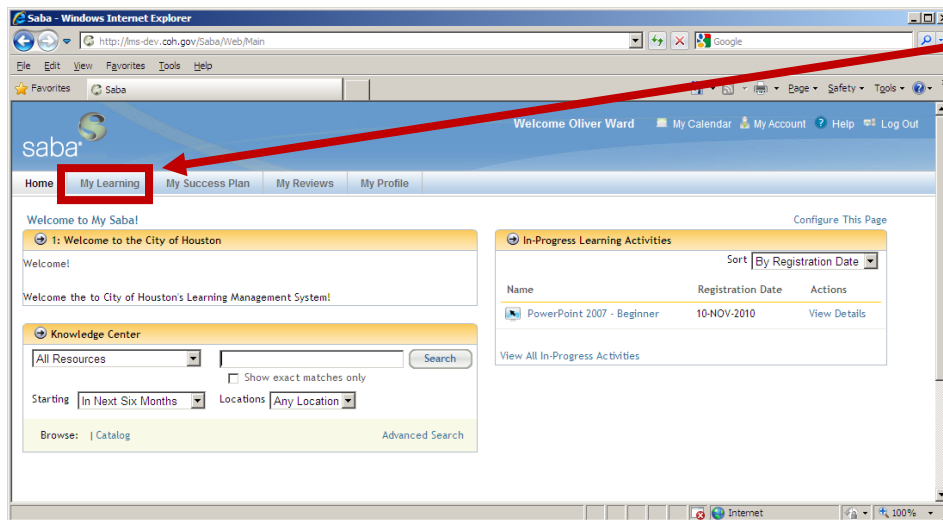
In the City of Houston's LMS, all course offerings require the approval of the manager or the supervisor of the employee to account for the time the employee will spend training instead of doing the job that he or she normally does. In the case of a course offering that has additional cost (i.e., dollars) that goes beyond the cost of the employee's time away from the job requires an OK from an Additional Approver. Each employee has one person assigned as his or her Additional Approver.

IMPORTANT NOTE:

In your role as additional approver, you are expected to ensure that there is enough money available in GL account #520805 in the cost center and fund applicable to the employee BEFORE approving the request.

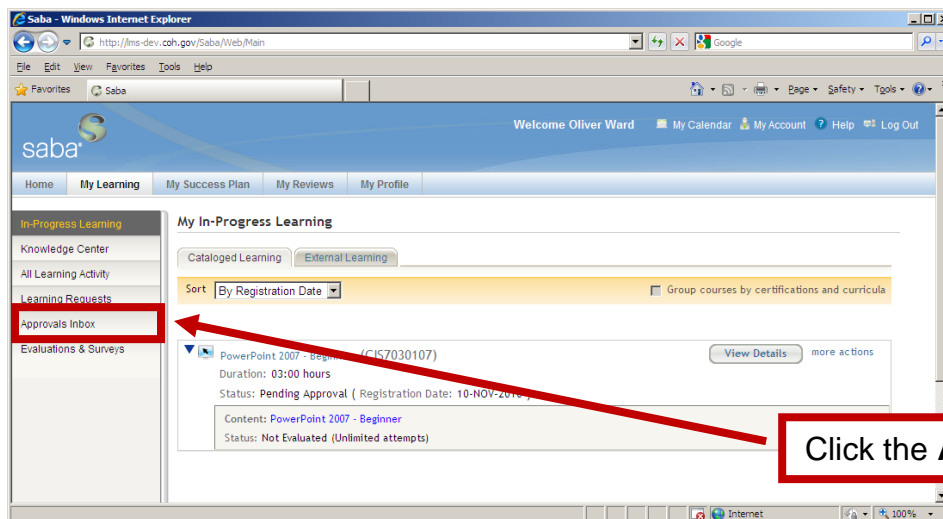
The purpose of this job aid is to show you how to perform the role of Additional Approver.

1. Log into the LMS. Ensure that you change your password from its original default value!
For details, refer to the Job Aid: Change Your Password.
2. Click the My Learning tab.



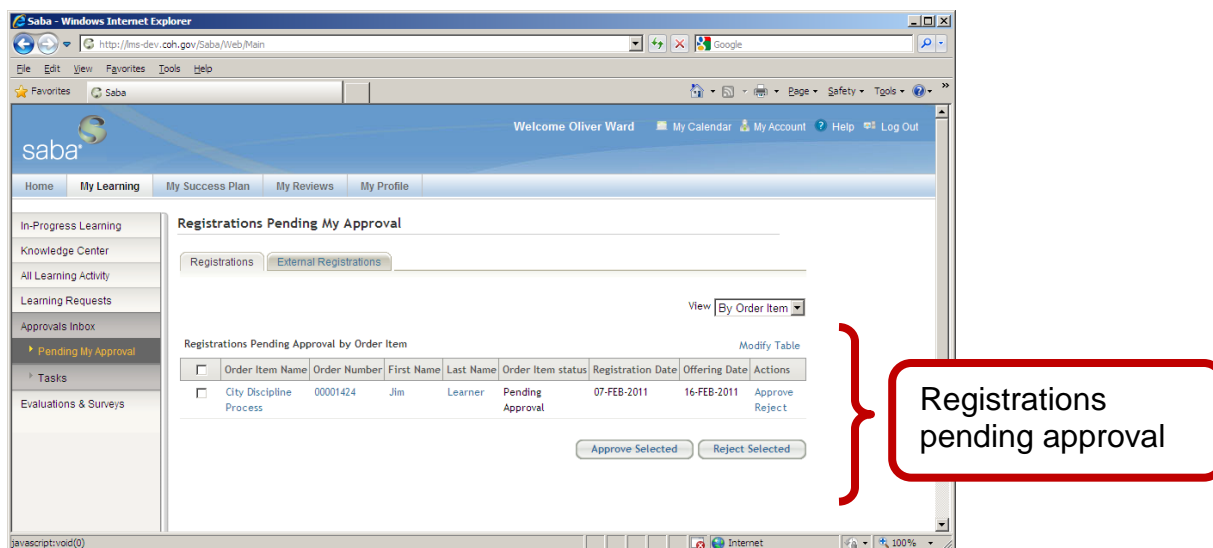
Click the **My Learning** tab

3. Click the Approvals Inbox section.

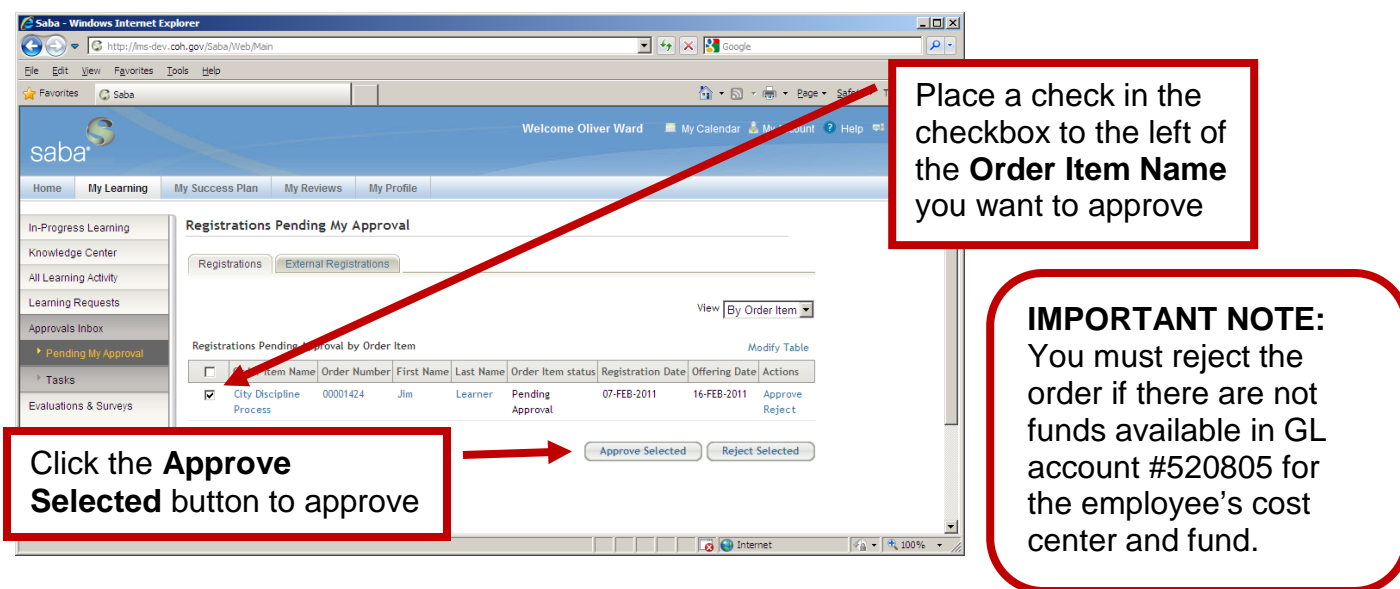


Click the **Approvals Inbox** section

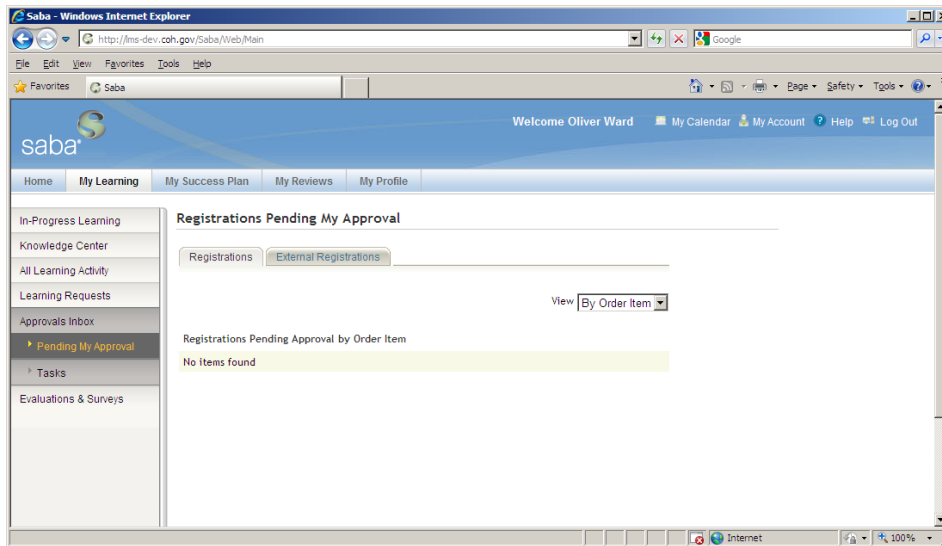
4. Review the registrations pending approval under the Registrations tab.



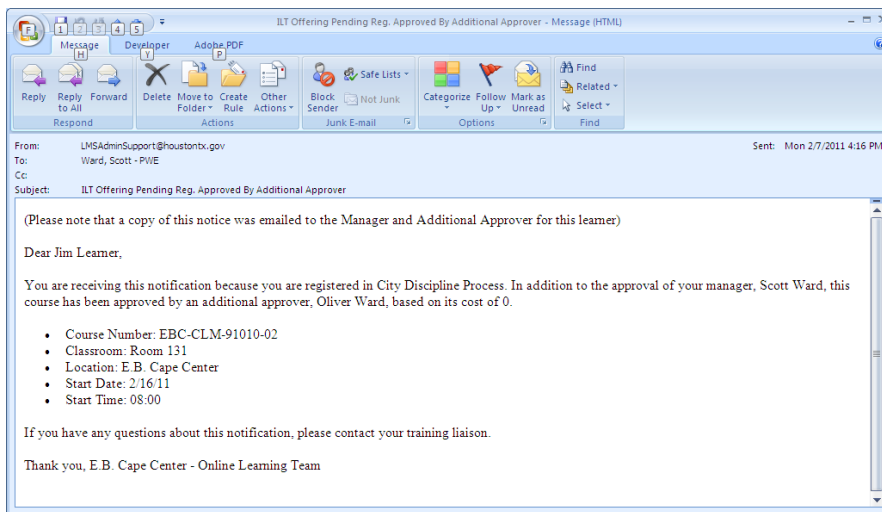
5. Click the checkbox to the left of the title link of the Order Item Name. Then click the Approve Selected button to provide the approval, as appropriate.



6. When the page returns, the Order Item pending approval is no longer shown.



7. Additionally, you should receive an e-mail that indicates that the request was approved by the additional approver.

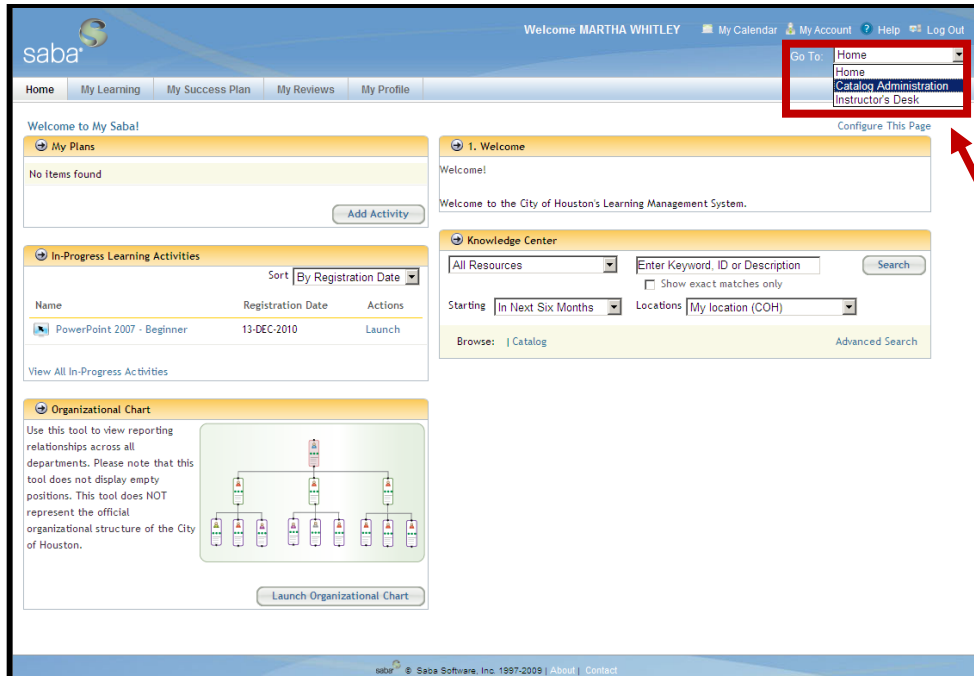


END OF PROCEDURE

LMS Job Aid: Create an Instructor-Led Offering

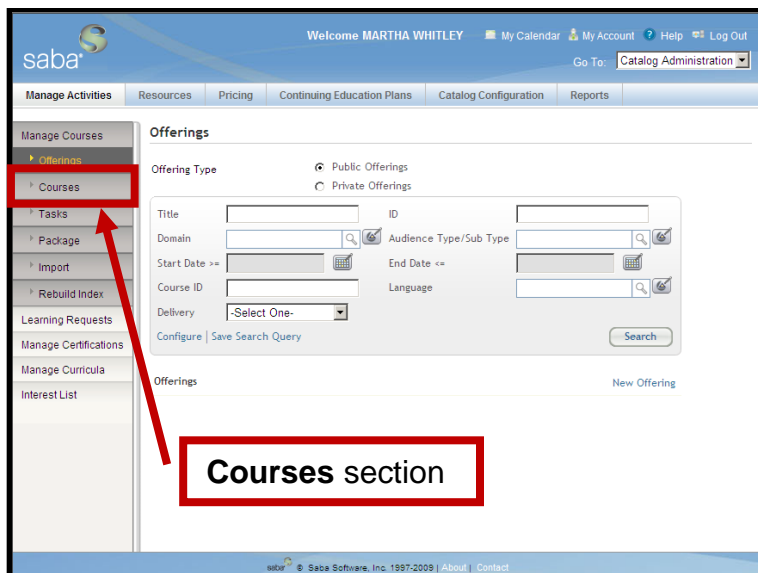
The purpose of this job aid is to show you how to create an instructor-led offering from an existing course.

1. Log into the LMS.
2. Select **Catalog Administration** from the **Go To:** roles drop-down list in the top right corner of the screen



Go To: drop-down box

3. Click the **Courses** section.



Courses section

-
- The screenshot displays the Saba LMS interface. At the top, the Saba logo is on the left, and the user 'MARTHA WHITLEY' is logged in. The navigation bar includes links for 'My Calendar', 'My Account', 'Help', and 'Log Out'. Below this, a 'Go To:' dropdown menu is set to 'Catalog Administration'.
- The main content area is titled 'Course' and features a search form. The 'Title' field contains the text 'Word 2007'. The 'Search' button is highlighted with a red box and an arrow. Below the search form, a table lists the search results. The table has columns for 'Title', 'Version', 'ID', and 'New Offering'. The results show 15 entries, all of which are 'New Offering' and have a 'Version' of '1'. The first few entries are 'Word 2007 - 1', 'Word 2007 - 2', 'Word 2007 - 3', 'Word 2007 - Advanced', and 'Word 2007 - Beginner'. The last entry is 'Word 2007 - Working with Longer Documents'.
- Red arrows and boxes are used to highlight specific elements: a red box around the 'Title' field, a red box around the 'Search' button, and a red box around the search results table. A red arrow points from the 'Title' field to the 'Search' button. A red arrow points from the 'Search' button to the search results table. A red box is also placed around the 'Search' button.
- | Title | Version | ID | New Offering |
|---|---------|----------------|--------------|
| Word 2007 - 1 | | EBC-CIS70401 | New Offering |
| Word 2007 - 2 | | EBC-CIS70402 | New Offering |
| Word 2007 - 3 | | EBC-CIS70403 | New Offering |
| Word 2007 - Advanced | | EBC-CIS704037 | New Offering |
| Word 2007 - Beginner | | EBC-CIS704017 | New Offering |
| Word 2007 - Collaborating with Others and Personal... | | EBC-CIS7044087 | New Offering |
| Word 2007 - Editing and Proofreading Documents | | EBC-CIS7044037 | New Offering |
| Word 2007 - Formatting Documents | | EBC-CIS7044047 | New Offering |
| Word 2007 - Getting Started | | EBC-CIS7044017 | New Offering |
| Word 2007 - Getting Started | | EBC-CIS7044027 | New Offering |
| Word 2007 - Intermediate | | EBC-CIS704027 | New Offering |
| Word 2007 - Transition | | EBC-CIS70407 | New Offering |
| Word 2007 - What's New | | EBC-CIS709027 | New Offering |
| Word 2007 - Working with Advanced Features | | EBC-CIS7044097 | New Offering |
| Word 2007 - Working with Columns and Tables | | EBC-CIS7044057 | New Offering |
| Word 2007 - Working with Graphical Elements | | EBC-CIS7044067 | New Offering |
| Word 2007 - Working with Longer Documents | | EBC-CIS7044077 | New Offering |

-
- Welcome MARTHA WHITLEY | My Calendar | My Account | Help | Log Out
- Go To: **Course Administration**
- Manage Activities** | Resources | Pricing | Continuing Education Plans | Catalog Configuration | Reports
- Manage Courses**
- Offerings
 - Courses**
 - Tasks
 - Package
 - Import
 - Rebuild Index
 - Learning Requests
 - Manager Certifications
 - Manager Curricula
 - Interest List
- Course**
- Title ID
- Domain Audience Type/Sub Type
- [Configure](#) | [Save Search Query](#) [Search](#)
- Courses** [New Course](#) | [Quick Course](#) | [Modify Table](#)
- | Title | Version | ID | New Offering |
|---|---------|----------------|--------------|
| Word 2007 - 1 | | EBC-CIS70401 | New Offering |
| Word 2007 - 2 | | EBC-CIS70402 | New Offering |
| Word 2007 - 3 | | EBC-CIS70403 | New Offering |
| Word 2007 - Advanced | | EBC-CIS704037 | New Offering |
| Word 2007 - Beginner | | EBC-CIS704017 | New Offering |
| Word 2007 - Collaborating with Others and Personal... | | EBC-CIS7044087 | New Offering |
| Word 2007 - Editing and Proofreading Documents | | EBC-CIS7044037 | New Offering |
| Word 2007 - Formatting Documents | | EBC-CIS7044047 | New Offering |
| Word 2007 - Getting Started | | EBC-CIS7044017 | New Offering |
| Word 2007 - Getting Started | | EBC-CIS7044027 | New Offering |
| Word 2007 - Intermediate | | EBC-CIS704027 | New Offering |
| Word 2007 - Transition | | EBC-CIS70407 | New Offering |
| Word 2007 - What's New | | EBC-CIS709027 | New Offering |
| Word 2007 - Working with Advanced Features | | EBC-CIS7044097 | New Offering |
| Word 2007 - Working with Columns and Tables | | EBC-CIS7044057 | New Offering |
| Word 2007 - Working with Graphical Elements | | EBC-CIS7044067 | New Offering |
| Word 2007 - Working with Longer Documents | | EBC-CIS7044077 | New Offering |
- Click the **Title** link for the course
- Saba Software Inc. 1997-2009 | About | Contact

6. At the Course Details page, click the **Delivery Types** tab.

The screenshot shows the Saba LMS interface. The top navigation bar includes 'Welcome MARTHA WHITLEY', 'My Calendar', 'My Account', 'Help', and 'Log Out'. Below this is a 'Go To:' dropdown menu set to 'Catalog Administration'. The main navigation menu on the left lists 'Manage Courses', 'Offerings', 'Courses', 'Tasks', 'Package', 'Import', 'Rebuild Index', 'Learning Requests', 'Manage Certifications', 'Manage Curricula', and 'Interest List'. The 'Courses' tab is selected. The main content area displays 'Course Details: Word 2007 - 1, #EBC-CIS70401'. The 'Delivery Types' tab is highlighted with a red box, and a red arrow points to it from a text box that says 'Click the Delivery Types tab'.

7. On the Delivery Types tab, click the link on the right for a New Instructor-Led Offering.

The screenshot shows the Saba LMS interface with the 'Delivery Types' tab selected. The main content area displays 'Delivery Types' with a table listing 'Delivery Types', 'Delivery Mode Details: Instructor-Led', and 'Delivery Mode Details: Physical Offering'. The 'New Instructor-Led Offering' link is highlighted with a red box, and a red arrow points to it from a text box that says 'Click the link for a New Instructor-Led Offering'.

9. At the New Instructor-Led Offering page, ensure that the Domain is set for **Common**. To ensure that the offering can be seen by people in all departments, the Domain must be set for Common.

NOTE: If you need to change the Domain, you may either start typing the first few letters of the name (at least two) and then click the magnifying glass icon for a list of Domains matching what you typed.

Or, you may just click the other button (to the right of the magnifying glass) to select from a full list of Domains.

WARNING: You must select the Domain from a list. The field will NOT accept any value that is typed!

Ensure that the Domain selected is **Common**

10. In the Scheduling Details area of the Offering page, click the **Calendar** icon to select the Start Date.

Use the Calendar icon to set the appropriate start date. Use the drop-down lists to select the proper month and year, and then click the link for the correct day to set the date.

Scheduling Details

Start Date* 01-FEB-2011

11. Use the pencil icon to select a Session Template.

When you click the pencil icon, the Select Session Template dialog box displays (see illustration at right). You should note that the template(s) available should match the day of the week for the date you selected above.

Select Session Template

1.Select Session Template 2.View Details

Name Start Day Tuesday

Duration (HH:MM) 08:00

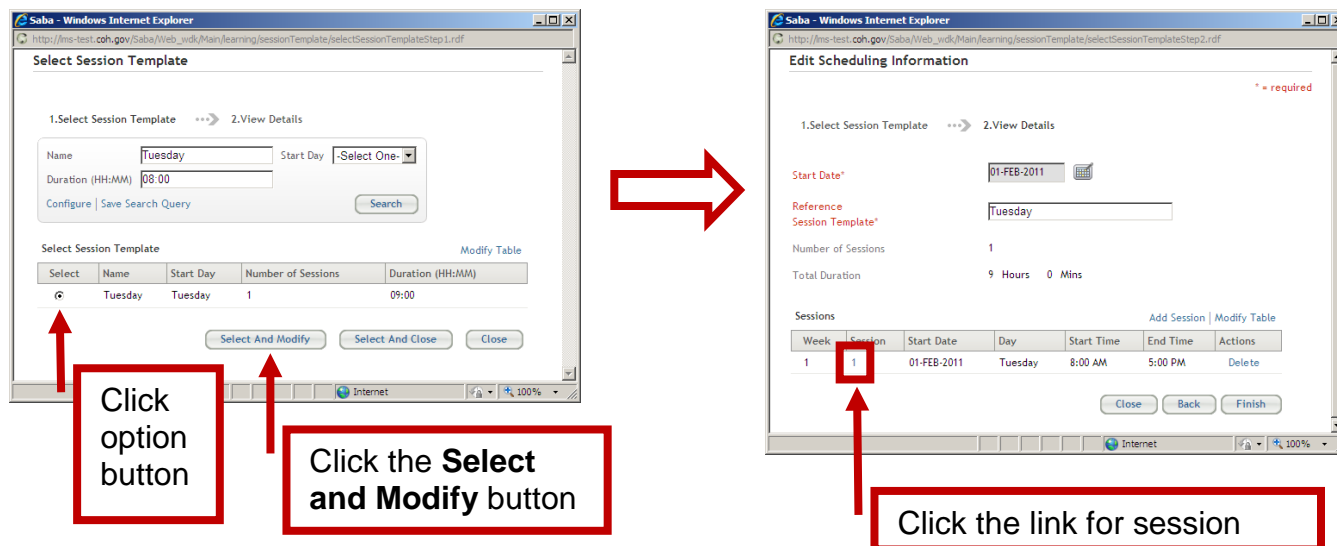
Configure Save Search Query Search

Select Session Template Modify Table

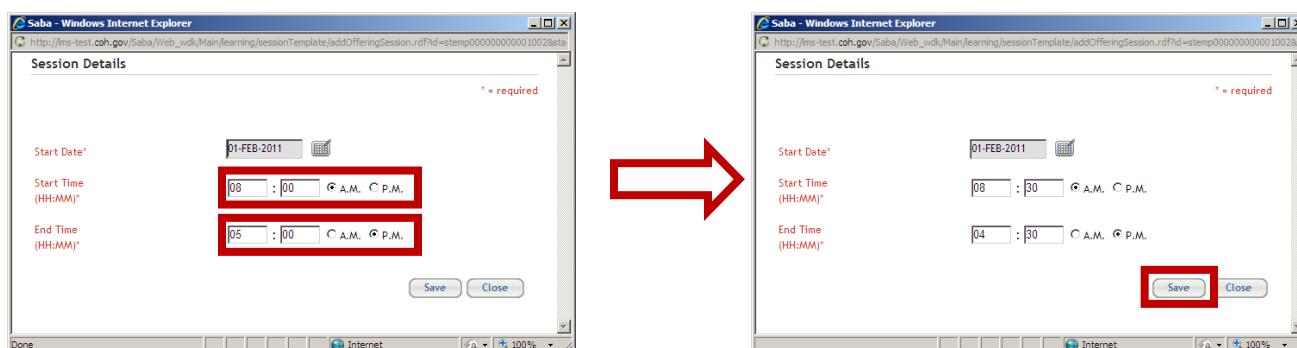
Select	Name	Start Day	Number of Sessions	Duration (HH:MM)
<input checked="" type="radio"/>	Tuesday	Tuesday	1	09:00

Select And Modify Select And Close Close

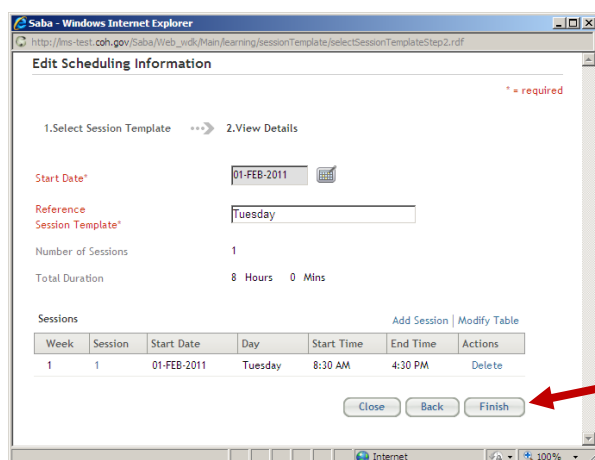
12. On the Select Session Template dialog box, click the round option button to select the template, and then click the Select and Modify button. When the Edit Scheduling Information dialog box displays, click the link for the session to continue.



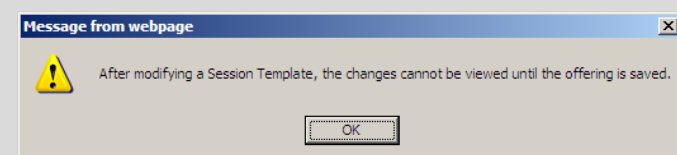
13. After clicking the link for the session, the Session Details dialog box displays. Fill in the appropriate starting and ending times, and then click the Save button.



14. After clicking the Save button above, the Edit Scheduling Details dialog box returns, showing the times you selected. Click the **Finish** button to accept the changes.



After you click the Finish button, you will be prompted with an alert dialog box that warns you with the following message:



You can just click OK and ignore this warning.

15. The Scheduling Details section now shows the correct Date, Session Template and Duration. On the Location field, click the button to the right of the magnifying glass icon to see a list of locations. From the Select Location dialog box, click the button to the left of the name E.B. Cape Center to continue.

Scheduling Details

Start Date * 01-FEB-2011

End Date

Session Template * Tuesday

Duration(HH:MM) * 08:00

Location *

Facility

Language *

Select Location

Name

[Configure](#) [Save Search Query](#) [Search](#)

Locations [Modify Table](#)

Select	Name	City	Administrator	Phone 1	Email	Fax
<input type="checkbox"/>	611 Walker					
<input type="checkbox"/>	COH					
<input checked="" type="checkbox"/>	E.B. Cape Center					
<input type="checkbox"/>	HFD Academy					

[Close](#)

16. The Scheduling Details section now also shows the correct Location. On the Language field, enter En (as in English) and click the magnifying glass icon. Select English from the drop-down list.

Scheduling Details

Start Date * 01-FEB-2011

End Date 01-FEB-2011

Session Template * Tuesday

Duration(HH:MM) * 08:00

Location * E.B. Cape Center

Facility

Language * En

Language

English

17. In the Pricing Information section, you see the Base Price, which is inherited from the Course information. Verify that the price listed is correct. If needed, you can create a new price specific to this offering.

Pricing Information

Base Price 35 (Inherited from Course)

Currency

Offering Price

Multi-Currency Pricing

☒ This Offering is available only in inherited currencies and currency selected above.

☐ This Offering is available in inherited currencies, the currency selected above and default currency, US Dollars.

☐ This Offering is available in all the active currencies in the system. Note: Prices are only calculated for currencies that have exchange rates defined in the system.

Training Units

18. In the Registration Information section, you see the Min Count, Max Count and Max In Wait List values, which are also inherited from the Course. Verify that these numbers are all correct for the offering.

Registration Information

Min Count*

Max Count*

Max In Wait List*

Student Count

Students Waitlisted

Vendor

Customer Service Representative

Allow Drop ☒ Yes, this offering can be dropped anytime after registration
☐ No, this offering cannot be dropped on and after date

19. In the Availability Information section, ensure that the check boxes called Display for Call Center and Display for Learner are both checked.

Availability Information

Display for Call Center ☒

Display for Learner ☒

Test ☐

Stop Auto-Promotion Date

Open Enrollment Date

Open Enrollment For All Audience Types Date

Enrollment Closes Before

Offering Reminder before Start Date (days)

Offering Completion Reminder after End Date (days)

Status

20. When all the steps above are completed, click the Finish button to create the offering.

Availability Information

Display for Call Center ☒

Display for Learner ☒

Test ☐

Stop Auto-Promotion Date

Open Enrollment Date

Open Enrollment For All Audience Types Date

Enrollment Closes Before

Offering Reminder before Start Date (days)

Offering Completion Reminder after End Date (days)

Click the Finish button to create the offering.

21. After you click the Finish button, you should see a new set of tabs at the top of the screen and a new set of buttons at the bottom. These indicate that you have successfully created the offering.

Instructor-Led Offering Details: Word 2007 - 1, # EBC-CIS70401, #00001241

Main Learning Assignments Expenses Related Info Policies

New Tabs appear at the top of the screen...

Copy Create New Offering Send Notification Roster Save Cancel

View Broadcast Offerings New Broadcast Offering

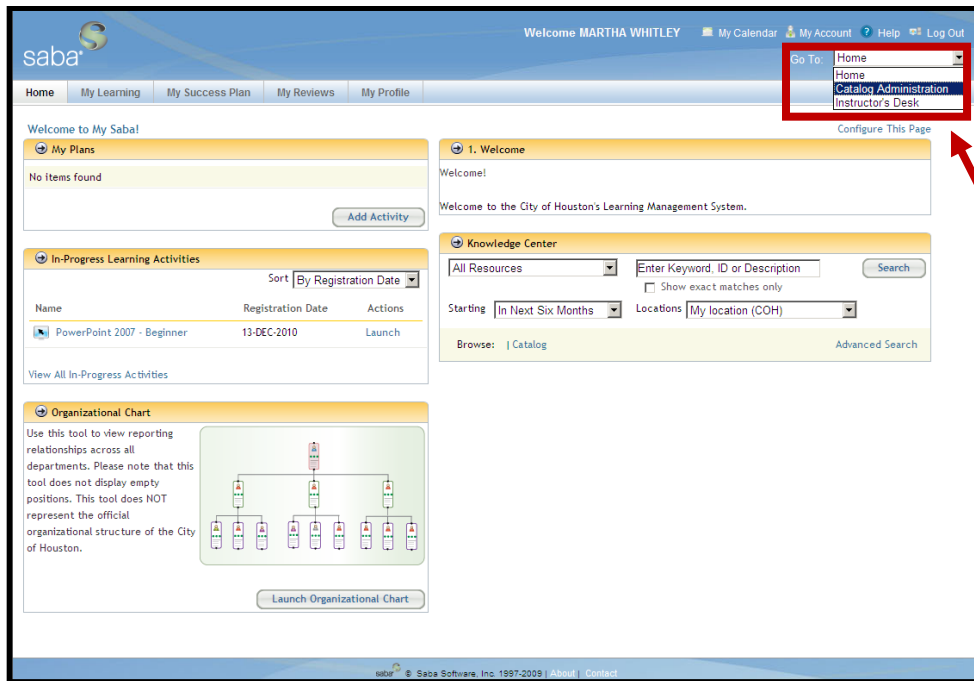
... and new Buttons appear at the bottom of the screen.

END OF PROCEDURE

LMS Job Aid: Apply an Audience Type to a Course

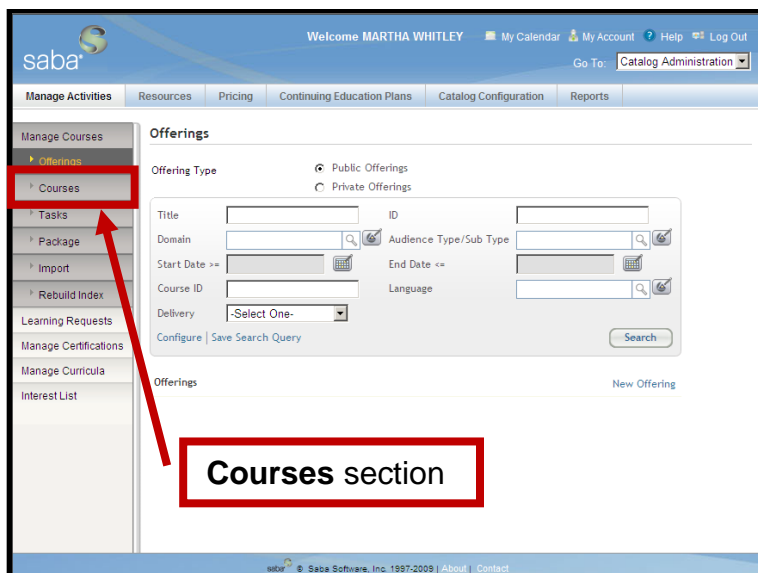
You can use Audience Types to restrict access to a course or offering in the catalog. The purpose of this job aid is to show you how to apply an existing Audience Type to a course.

1. Log into the LMS.
2. Select **Catalog Administration** from the **Go To:** roles drop-down list in the top right corner of the screen

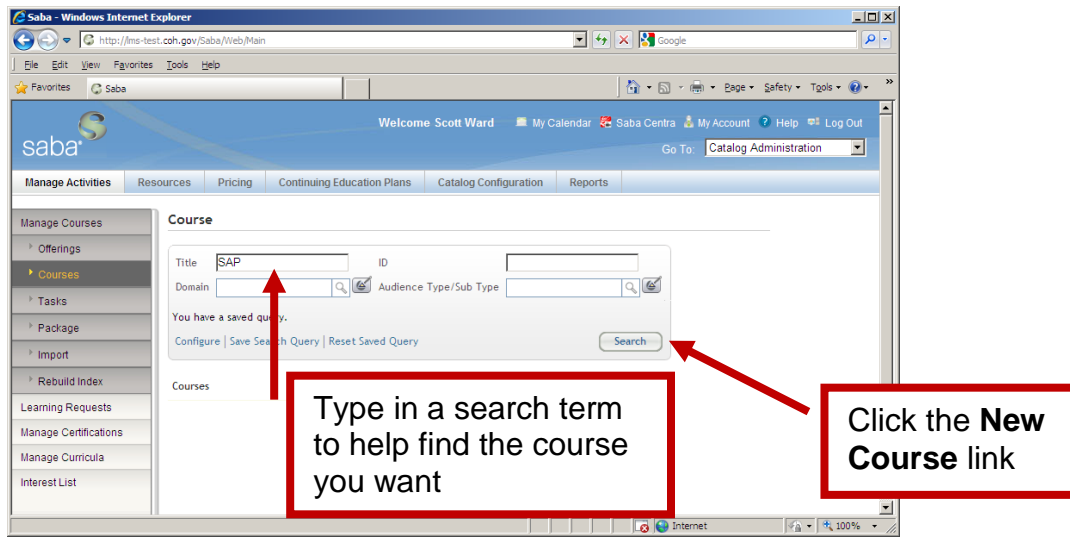


Go To: drop-down box

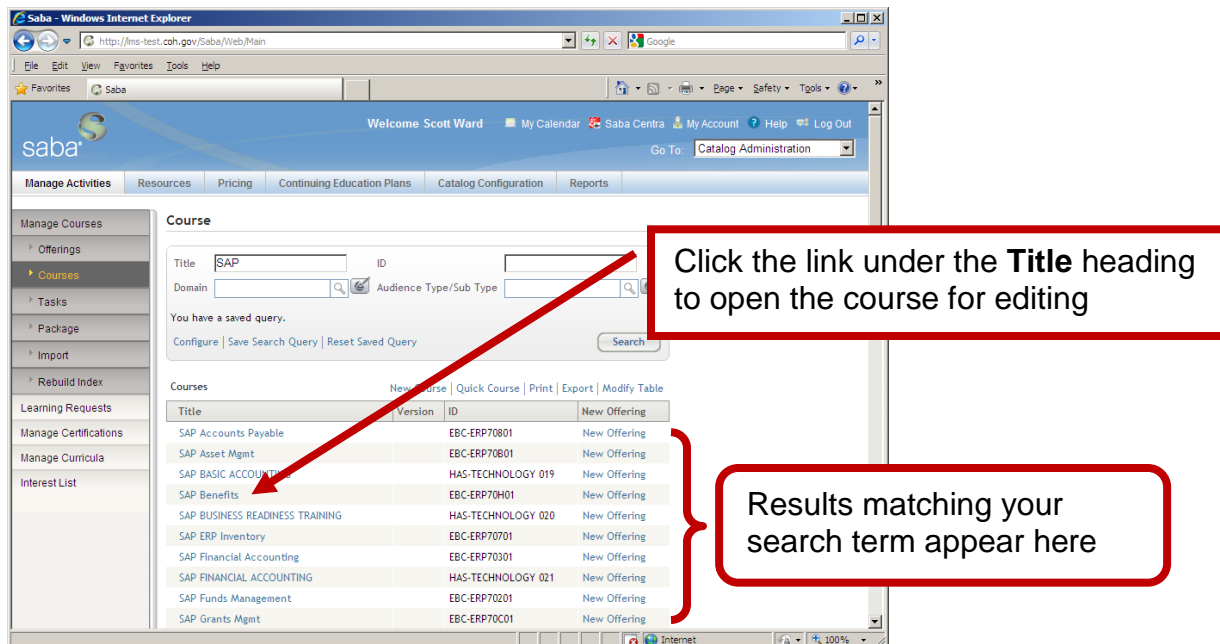
3. Click the **Courses** section.



- Enter a keyword or phrase to locate the course you want to work with. (You may also choose to filter by Domain, or use a course ID.) After you have entered the proper information, click the **Search** button.



- Find the course you want to work with in the list of search results. Click the link under the **Title** heading to open the course for editing. In this case we'll choose the SAP Benefits course.



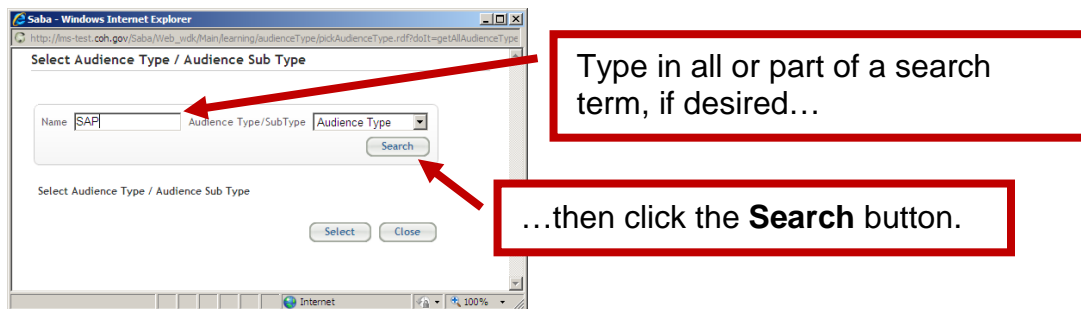
- At the Course Details page, scroll down until you can see the Audience Type / Audience Sub Type section. When you have found the section, click the **Add Audience Type** link.

The screenshot shows the Saba LMS interface. The top navigation bar includes 'Welcome Scott Ward', 'My Calendar', 'Saba Centra', 'My Account', 'Help', and 'Log Out'. Below this is a 'Go To:' dropdown menu set to 'Catalog Administration'. The main content area is titled 'Course Details: SAP Benefits, #EBC-ERP70H01'. The 'Main' tab is selected, showing fields for Title (SAP Benefits), ID (EBC-ERP70H01), Version, Domain (Common), Abstract, Description, Course DeepLink URL, Owner, Pricing Information, Availability Information, and Registration Information. The 'Audience Type / Audience Sub Type' section is highlighted with a red box and a red arrow pointing to the 'Add Audience Type / Audience Sub Type' link.

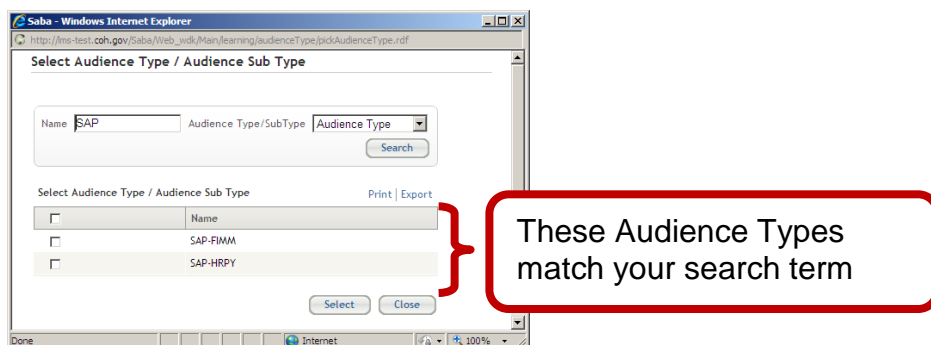
Click the **Add Audience Type** link

This is section for Audience Type and Sub Types

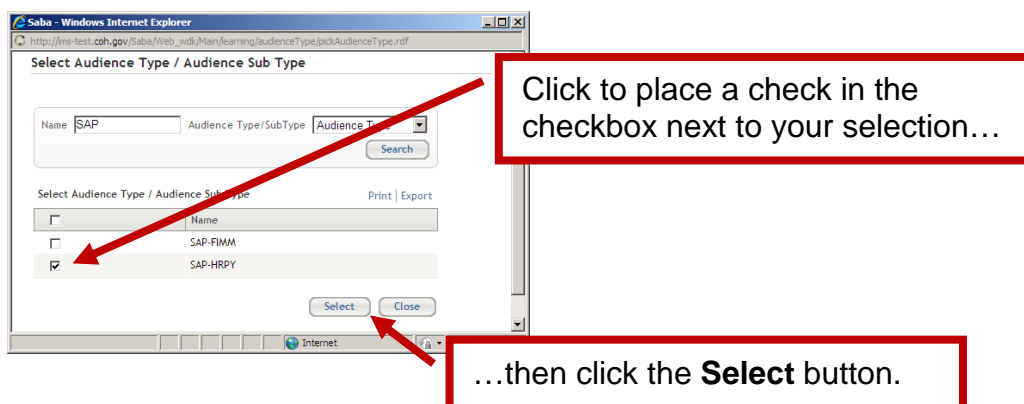
- At the Select Audience Type / Audience Sub Type screen, you may type in all or part of the name if you know it to limit the search. Then, click the Search button to see the available Audience Types.



- After you click the Search button, the screen returns with the Audience Types that match.



- Click the checkbox to the left of your selection(s) and click the Select button to associate them to the course. NOTE: You may select more than one Audience Type at a time, if applicable.



10. Check the Course Details window to verify that your Audience Type is now listed. Click the Save button to confirm the change.

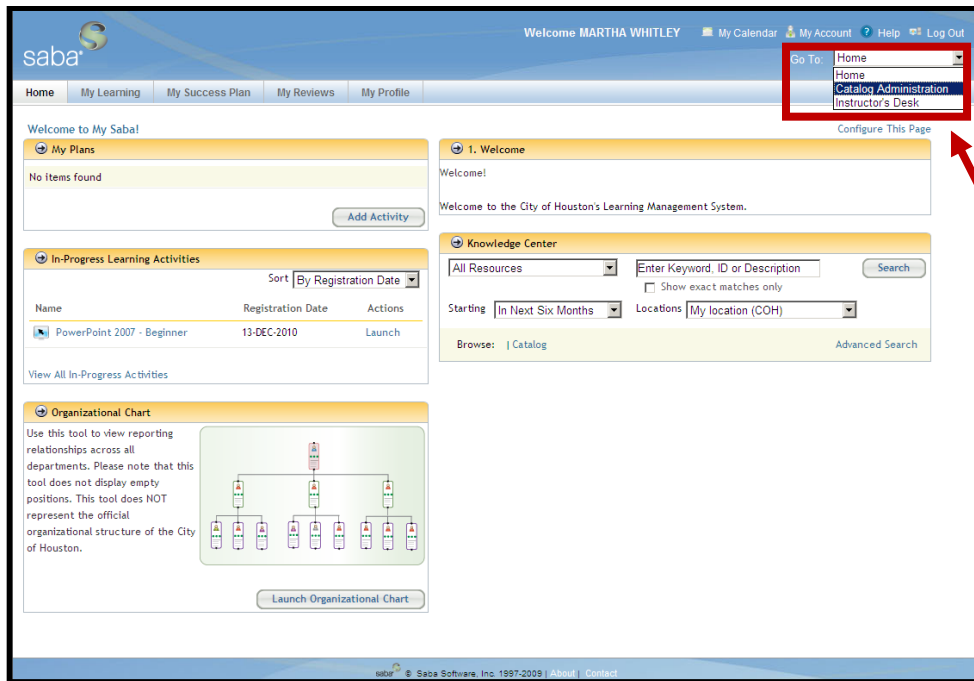
The screenshot shows the Saba LMS interface in Internet Explorer. The browser address bar displays 'http://lms-test.coh.gov/Saba/Web/Main'. The Saba logo is in the top left, and the user 'Scott Ward' is logged in. The navigation menu on the left includes 'Manage Courses', 'Offerings', 'Courses', 'Tasks', 'Package', 'Import', 'Rebuild Index', 'Learning Requests', 'Manage Certifications', 'Manage Curricula', and 'Interest List'. The main content area is titled 'Course Details: SAP Benefits, #EBC-ERP70H01'. Below the title are tabs for 'Main', 'Learning Assignments', 'Related Info', 'Policies', and 'Delivery Types'. The 'Main' tab is active, showing the 'Course Details' section with fields for Title, ID, Version, Domain, Abstract, Description, and Course DeepLink URL. The 'Audience Type / Audience Sub Type' section shows a table with one entry: 'SAP-HRPY'. The 'Registration Information' section includes fields for Min Count, Max Count, Waitlist Max, Vendor, Customer Service Representative, Learning Request Manager, and Target Days. At the bottom, there are buttons for 'View All Offerings', 'Create New Version', 'Save', and 'Cancel'. A red arrow points from the 'Save' button to a callout box that says 'Click the **Save** button to finalize the change'. Another red bracket points from the 'SAP-HRPY' entry in the Audience Type section to a callout box that says 'Your Audience Type match now appears in the Course Details'.

END OF PROCEDURE

LMS Job Aid: Create an Audience Type

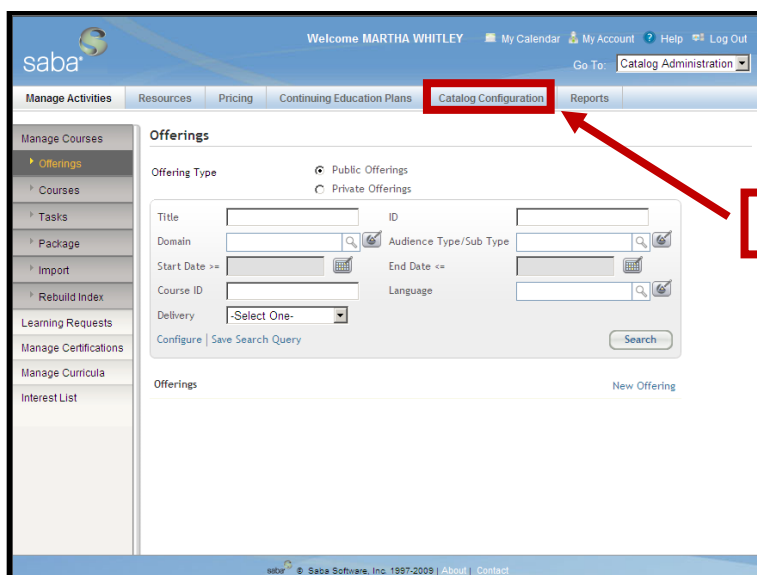
Audience Types are a means of filtering the visibility of courses and offerings in the LMS Catalog. The purpose of this job aid is to show you how to create an audience type.

1. Log into the LMS.
2. Select **Catalog Administration** from the **Go To:** roles drop-down list in the top right corner of the screen



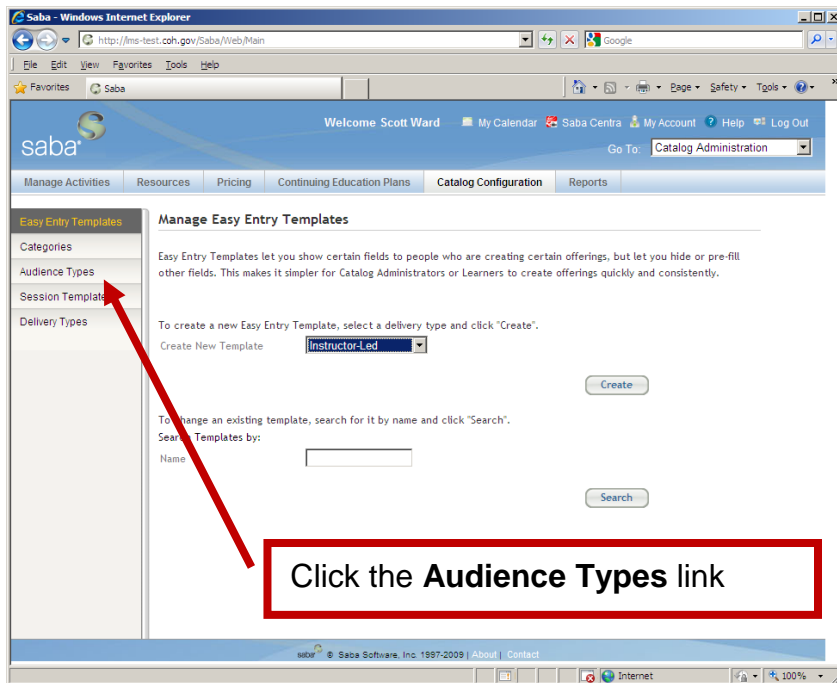
Go To: drop-down box

3. Click the **Catalog Configuration** tab.

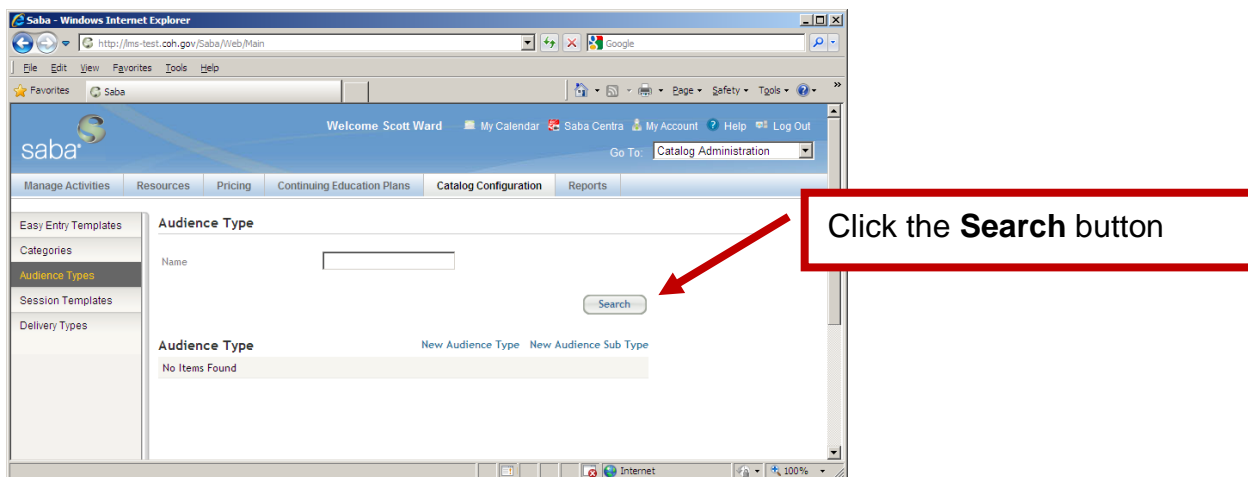


Courses section

4. Click the Audience Types link.



5. At the Audience Type screen, click the Search button.



6. Review the existing Audience Types in the list. If needed, click the plus icon [+] to the left of a listing to reveal the Audience Sub-Types beneath it.

If needed, click the **[+]** icon to expand the listing and show the Audience Sub-Types

Existing Audience Types appear in this section of the screen

7. To create a new Audience Type, click the **New Audience Type** link.

Click the link for a **New Audience Type**

- Type a name for the new audience type in the **Name** field.

The screenshot shows the 'New Audience Type' form in the Saba LMS. The 'Name' field is highlighted with a red box and a red arrow pointing to it from a text box on the right. The 'Description' field is empty. The 'Pricing Precedence' field is blank. The 'Domain' field is set to 'world'. The 'Save' and 'Cancel' buttons are at the bottom.

Type a name for the new audience type in the **Name** field

- Type a description for the new audience type in the **Description** field, as appropriate. Unless specifically requested, leave the Pricing Precedence field blank.

The screenshot shows the 'New Audience Type' form in the Saba LMS. The 'Name' field contains 'SAP-FIMM'. The 'Description' field contains 'Restricts access to SAP-FIMM offerings in the catalog to those who have this audience type assigned'. The 'Pricing Precedence' field is blank. The 'Domain' field is set to 'world'. The 'Save' and 'Cancel' buttons are at the bottom. Two red arrows point from text boxes to the 'Description' and 'Pricing Precedence' fields.

Type a description in the **Description** field, if needed

Leave the **Pricing Precedence** field blank unless a specific value was provided in the request

10. Ensure that the Domain is set to **Common**. To ensure that the offering can be seen by people in all departments, the Domain must be set for Common.

Ensure that the Domain selected is **Common**

NOTE: If you need to change the Domain, you may start by typing the first few letters of the name (at least two) and then click the magnifying glass icon for a list of Domains matching what you typed.

Magnifying Glass icon

Or, you may just click the other button (to the right of the magnifying glass) to select from a full list of Domains.
WARNING: You must select the Domain from a list. The field will NOT accept any value that is typed!

11. When the screen is complete, click the **Save** button to create the new Audience Type.

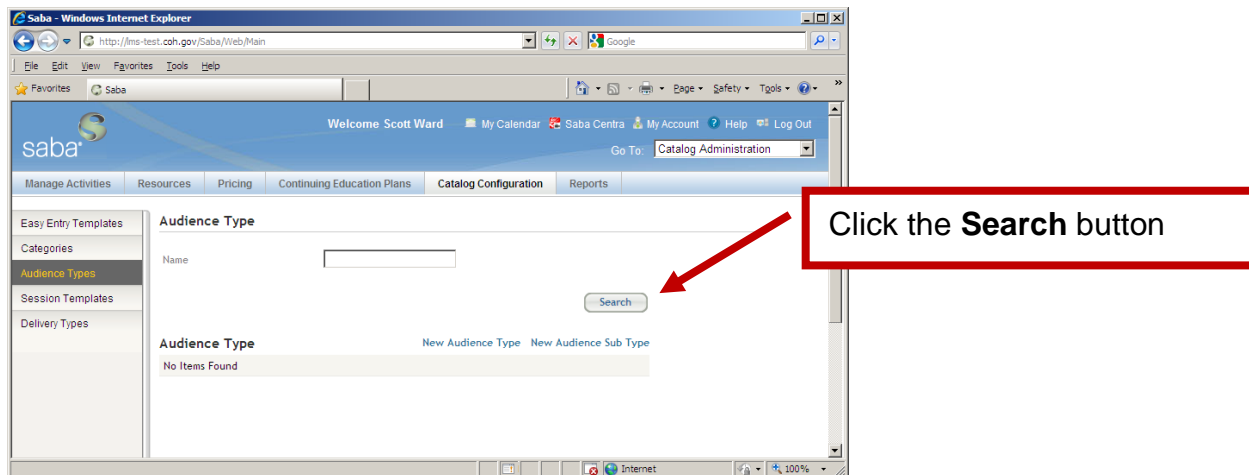
Click the Save button

12. After you click the Save button, the screen displays two new areas. The Organization area can be used to associate the Audience Type to everyone in an organization at once. The Person area can be used to associate the Audience Type to one or more individuals. Click the **Audience Types** link to proceed.

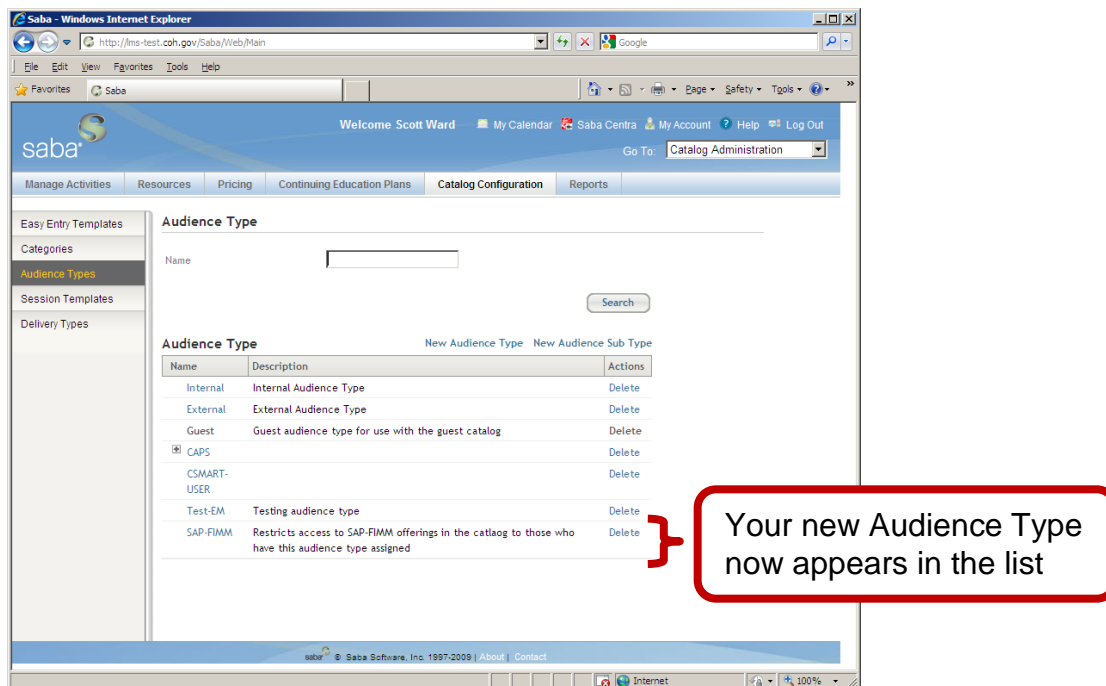
Click the Audience Types link

The Organization and Person areas appear AFTER you click the Save button

13. At the Audience Type screen, click the **Search** button again.



14. You should now see the new Audience Type you just created in the list.

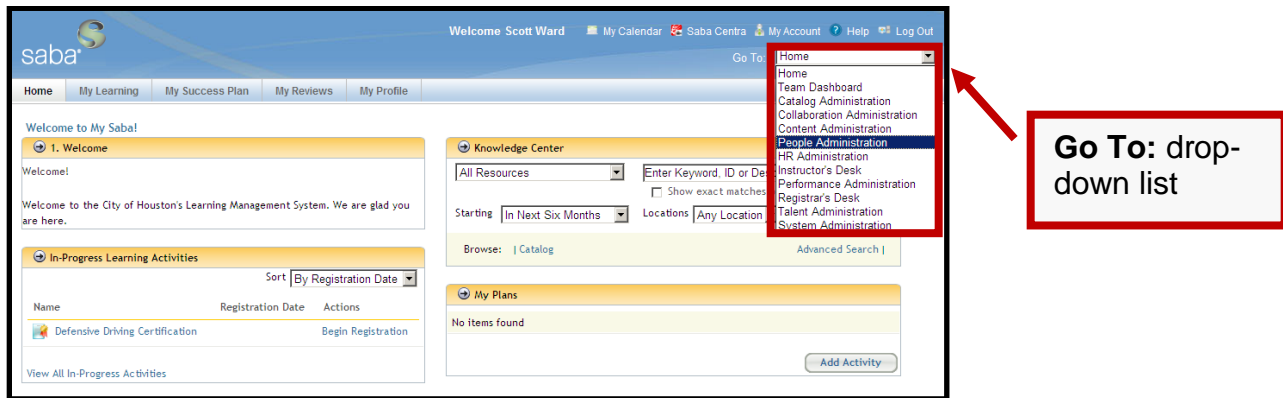


END OF PROCEDURE

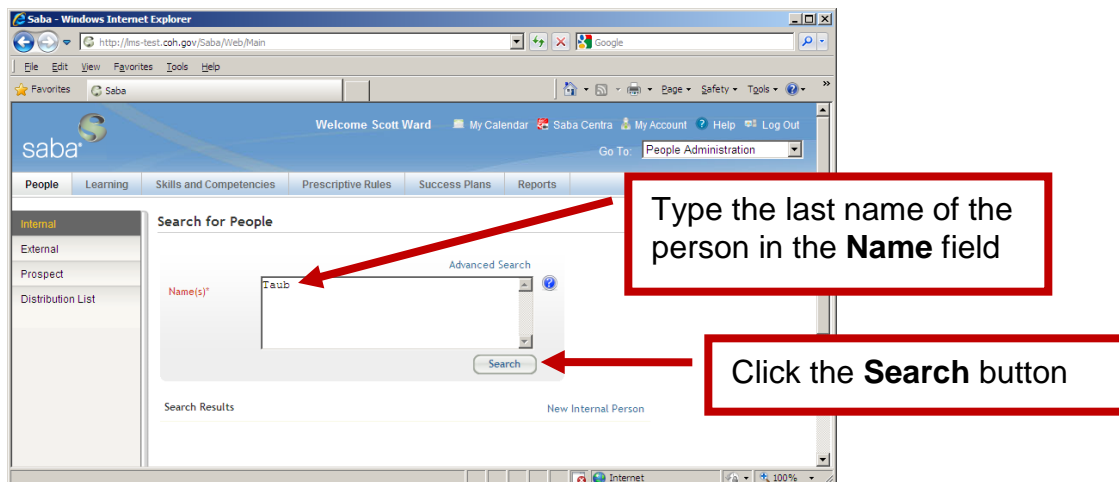
LMS Job Aid: Apply an Audience Type to a Person

You can use Audience Type to permit a person to access a course or offering that is restricted by Audience Type. The purpose of this job aid is to show you how to apply an existing Audience Type to a person.

1. Log into the LMS.
2. Select **People Administration** from the **Go To:** roles drop-down list in the top right corner of the screen



3. At the Search for People screen, type the last name of the person you want in the Name field. Then, click the **Search** button.



- Click the Edit Profile Information link for the person. For this example, we will select Ray Taub.

Click the **Edit Profile Information** link

The results of your search appear here

Last Name	First Name	Username	Person Type	Person ID	Organization	Location	Job	View
TAUB	JUDITH	E112035	3	112035	HAS - Human Resources	COH	304.1 26	Edit Profile Information Profile Snapshot Full Profile
TAUB	Ray	909096	3	909096	PWE - EB Cape Center	COH	467.2 23	Edit Profile Information Profile Snapshot Full Profile
TAUB	ROLAND	E106382	3	106382	PWE - EB Cape Center	COH	467.2 23	Edit Profile Information Profile Snapshot Full Profile

- Click the Privileges tab.

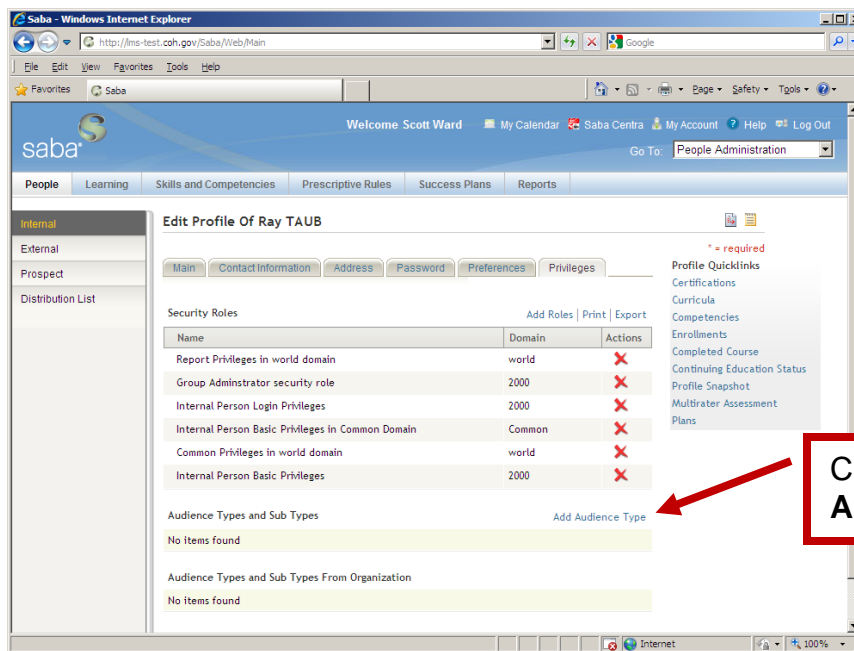
Click the **Privileges** tab

Edit Profile Of Ray TAUB

Profile Quicklinks: [Certifications](#), [Curricula](#), [Competencies](#), [Enrollments](#), [Completed Course](#), [Continuing Education Status](#), [Profile Snapshot](#), [Multirater Assessment](#), [Plans](#)

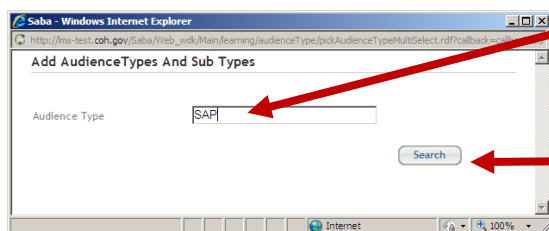
Fields: Title, First Name, Middle Name, Domain, Home Domain, Organization, Job, Manager, Additional Approver for Orders, Location, Start Date, Religion, Terminated On, Manager Access, TimeZone, Username, Last Name, Suffix, Status, Gender, Person No, Person Legal ID, Business Card Title, E-mail, Type, Date of Birth, Discount, Alternate Managers, Alternate Team Members.

6. Click the Add Audience Type link.



Click the **Add Audience Type** link

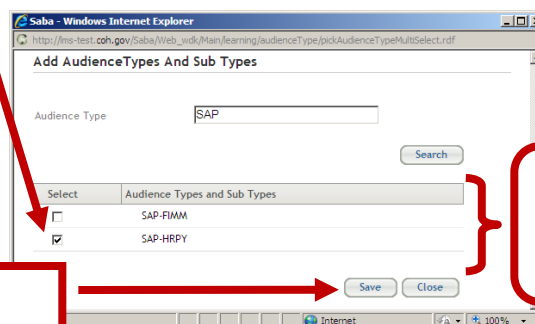
7. Type in all or part of the Audience Type in the Audience Type field. Then click the Search button.



Type in all or part of the desired Audience Type in the **Audience Type** field

Click the **Search** button

8. The results of your search are displayed. Click to place a check in the checkbox to the left of the Audience Type you want to select, then click the Save button to assign it.

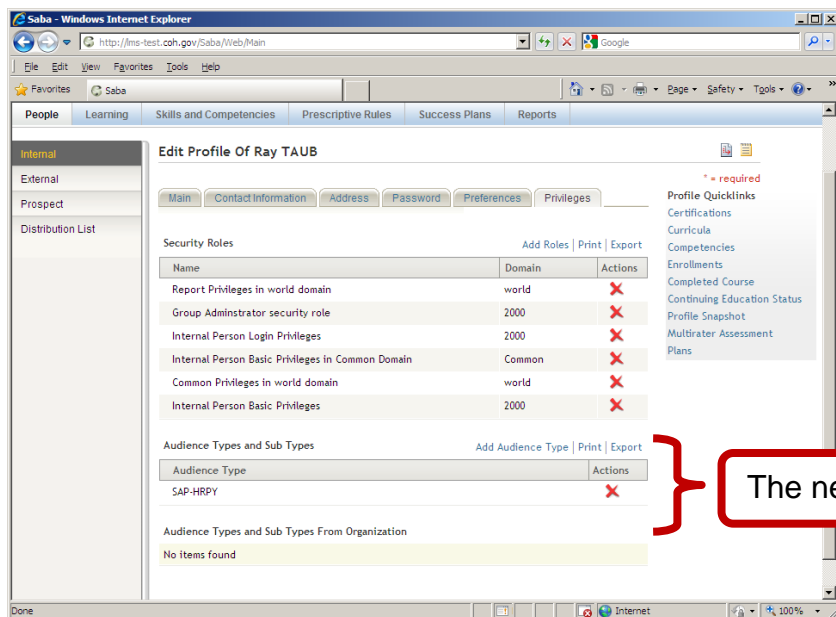


Click the checkbox to the left of the Audience Type you want to assign to select it...

The results of your search appear here

...then click the **Save** button.

9. Verify that the new Audience Type now appears

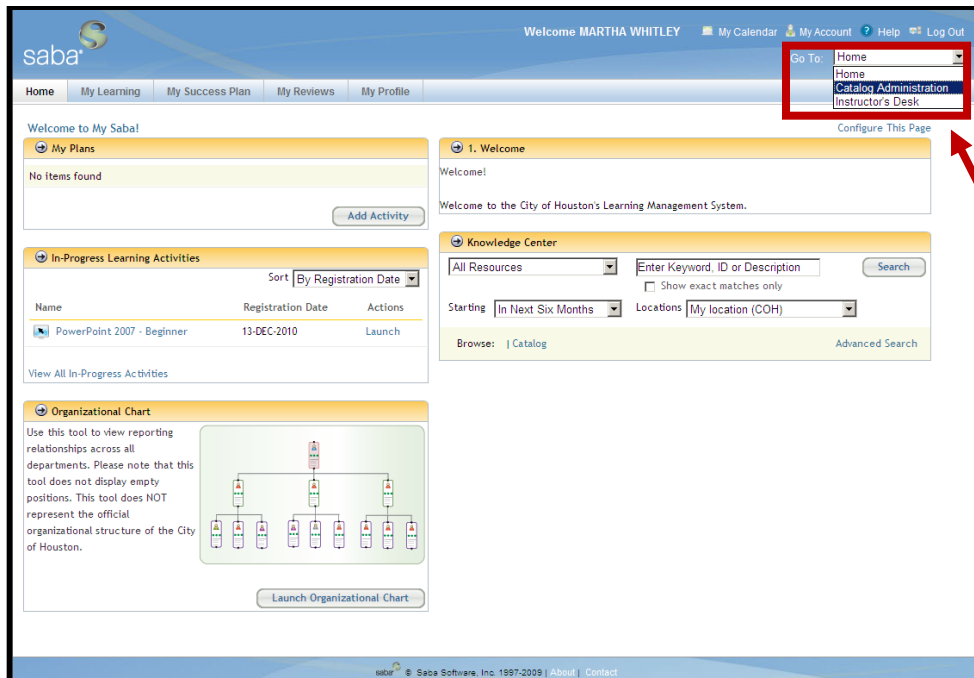


END OF PROCEDURE

LMS Job Aid: Create a Course

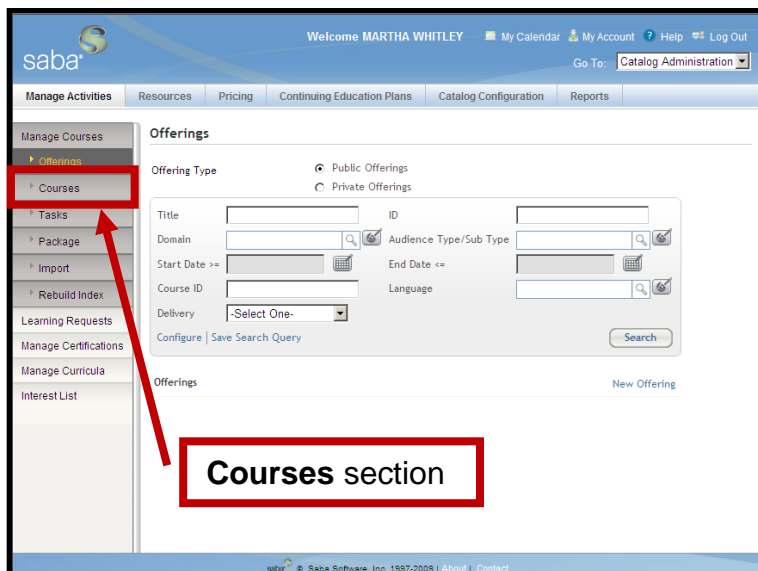
The purpose of this job aid is to show you how to create a course.

1. Log into the LMS.
2. Select **Catalog Administration** from the **Go To:** roles drop-down list in the top right corner of the screen



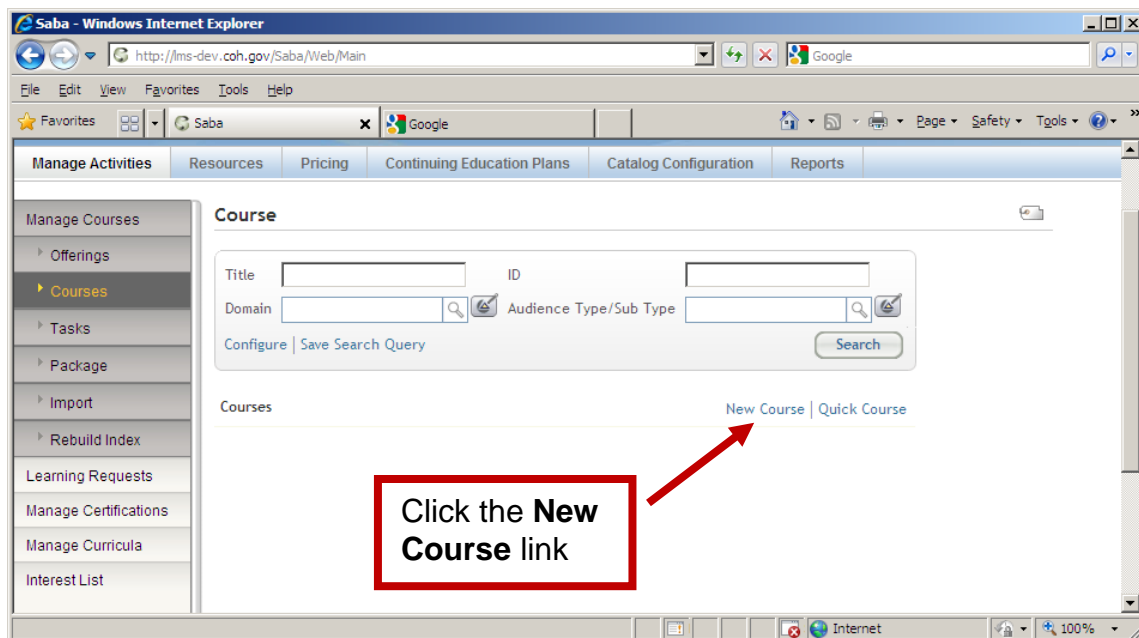
Go To: drop-down box

3. Click the **Courses** section.

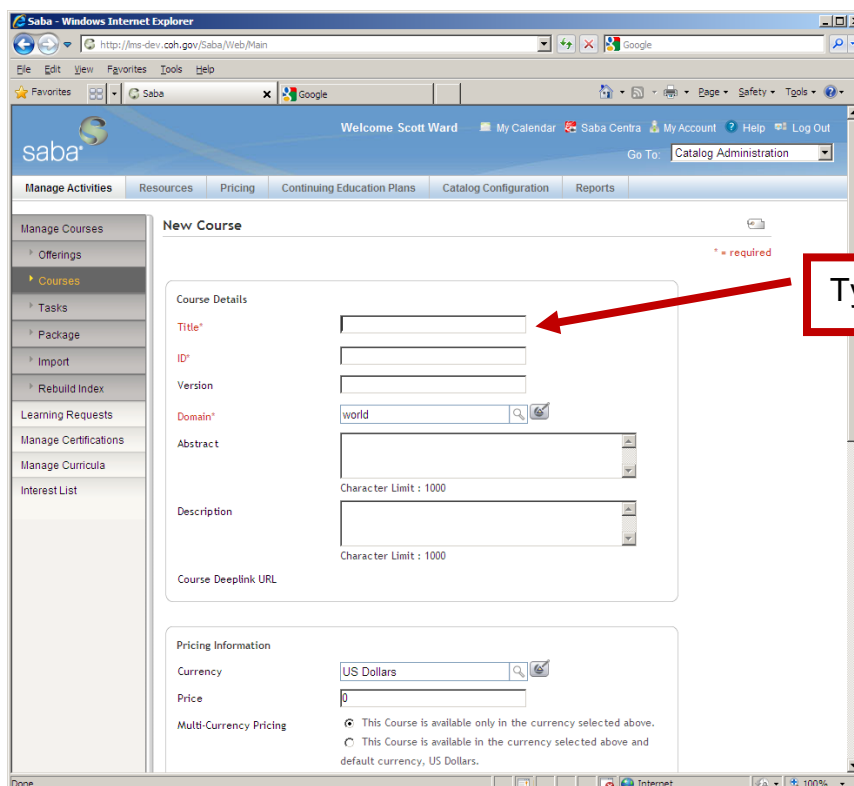


Courses section

4. Click the New Course link.



5. Type in a title for the course in the Title field.



The course titles and codes for EB Cape events are as follows:

- City Training – CT-Event
 - CODE: EBC-CT-EVENT
- City Meeting – CM-Event
 - CODE: EBC-CM-EVENT
- Outside Training – OT-Event
 - CODE: EBC-OT-EVENT
- Outside Meeting – OM-Event
 - CODE: EBC-OM-EVENT

6. At the Course Details page, click the **Delivery Types** tab.

The screenshot shows the 'New Course' form in the Saba LMS. The 'Domain' field is highlighted with a red box and an arrow pointing to it. The 'Title' field contains 'CM-Event' and the 'ID' field contains 'EBC-OM-EVENT'.

Type a course code in the ID field

The course titles and codes for EB Cape events are as follows:

- City Training – CT-Event
 - CODE: EBC-CT-EVENT
- City Meeting – CM-Event
 - CODE: EBC-CM-EVENT
- Outside Training – OT-Event
 - CODE: EBC-OT-EVENT
- Outside Meeting – OM-Event
 - CODE: EBC-OM-EVENT

7. Use either the magnifying glass or the “picker” button to select **EB Cape Event** as the domain for the course

The screenshot shows the 'New Course' form in the Saba LMS. The 'Domain' field is highlighted with a red box and an arrow pointing to it. The 'Title' field contains 'CM-Event' and the 'ID' field contains 'EBC-OM-EVENT'.

Use either the magnifying glass or the “picker” button to select **EB Cape Event** as the domain for the course

NOTE: When you need to change the Domain, just start typing the first few letters of the name (at least two) and then click the magnifying glass icon for a list of Domains matching what you typed.

The close-up shows the 'Domain' field with 'EB' and the 'Name' field with 'EB Cape Events'. A red arrow points to the magnifying glass icon.

Magnifying Glass icon

Or, you may click the “picker” button (to the right of the magnifying glass) to select the value from a full list of Domains.

WARNING: You must select the Domain from a list. The field will NOT accept any value that is typed!

8. Type an abstract for the course in the **Abstract** field, if needed.

The screenshot shows the 'New Course' form in the Saba LMS. The 'Course Details' section includes fields for Title, ID, Version, Domain, Abstract, Description, and Course DeepLink URL. The 'Abstract' field is highlighted with a red box and an arrow pointing to it. The 'Description' field is also highlighted with a red box and an arrow pointing to it. The 'Pricing Information' section includes fields for Currency and Price.

Type an abstract for the course in the **Abstract** field, if needed

9. Type a description for the course in the **Description** field, if needed.

The screenshot shows the 'New Course' form in the Saba LMS. The 'Course Details' section includes fields for Title, ID, Version, Domain, Abstract, Description, and Course DeepLink URL. The 'Description' field is highlighted with a red box and an arrow pointing to it. The 'Abstract' field is also highlighted with a red box and an arrow pointing to it. The 'Pricing Information' section includes fields for Currency and Price.

Type a description for the course in the **Description** field, if needed

10. If a price was provided for the event, enter it in the Price field. Otherwise, leave the Price field set at \$0. Do not change any other values in the Pricing Information section.

The screenshot shows the 'New Course' form in the Saba LMS. The 'Pricing Information' section is highlighted with a red box. The 'Price' field is set to 0. The 'Available From' date is set to 27-MAY-2011. The 'Display for Call Center' and 'Display for Learner' checkboxes are both checked.

If a price for the event was provided, enter it here; otherwise, leave the price set to \$0

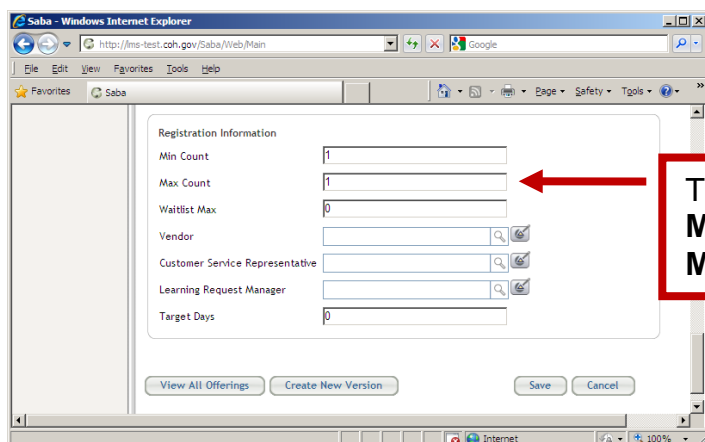
11. Verify that the Available From date shown is appropriate for the event. Also ensure that both the Display for Call Center and the Display for Learner check boxes are checked.

The screenshot shows the 'New Course' form in the Saba LMS. The 'Availability Information' section is highlighted with a red box. The 'Available From' date is set to 27-MAY-2011. The 'Display for Call Center' and 'Display for Learner' checkboxes are both checked. The 'Registration Information' section is also visible, showing fields for Min Count, Max Count, Waitlist Max, Vendor, Customer Service Representative, Learning Request Manager, and Target Days.

Verify that the **Available From** date is set for today's date

Also ensure that both the **Display for Call Center** and **Display for Learner** check boxes are checked

12. Type a 1 in both the **Min Count** and the **Max Count** fields and a 0 in the **Waitlist Max** field.



Registration Information

Min Count: 1

Max Count: 1

Waitlist Max: 0

Vendor: []

Customer Service Representative: []

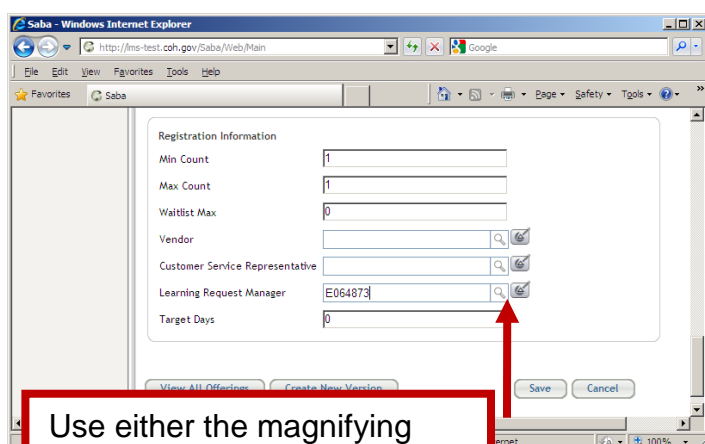
Learning Request Manager: []

Target Days: 0

Buttons: View All Offerings, Create New Version, Save, Cancel

Type a 1 in both the **Min Count** and the **Max Count** fields and a 0 in the **Waitlist Max** field

13. Type in the employee number for the Learning Request Manager in the Learning Request Manager field and click the **magnifying glass** button. Then, select the name from the list.



Registration Information

Min Count: 1

Max Count: 1

Waitlist Max: 0

Vendor: []

Customer Service Representative: []

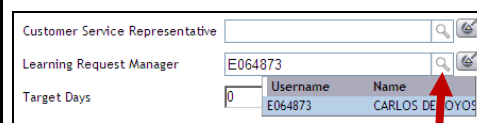
Learning Request Manager: E064873

Target Days: 0

Buttons: View All Offerings, Create New Version, Save, Cancel

Use either the magnifying glass or the "picker" button to select **EB Cape Event** as the domain for the course

NOTE: When you need to add a Learning Request Manager, just copy and paste the employee number of the person and then click the magnifying glass icon to get the full name of the person.



Customer Service Representative: []

Learning Request Manager: E064873

Target Days: 0

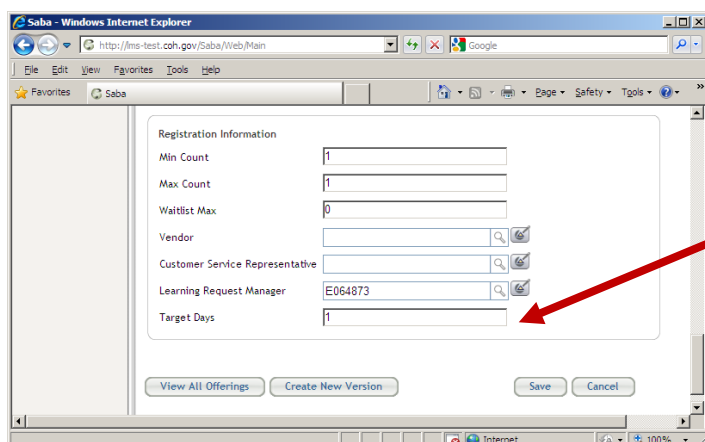
Username	Name
E064873	CARLOS DE LOYOS

Magnifying Glass icon

Or, you may click the "picker" button (to the right of the magnifying glass) to select the person from a full list of people.

WARNING: You must select the Learning Request Manager from a list. The field will NOT accept any value that is typed!

14. If the event lasts one day or less, type a 1 in the **Target Days** field. Otherwise, enter the number of days for the event in the **Target Days** field.



Registration Information

Min Count: 1

Max Count: 1

Waitlist Max: 0

Vendor: []

Customer Service Representative: []

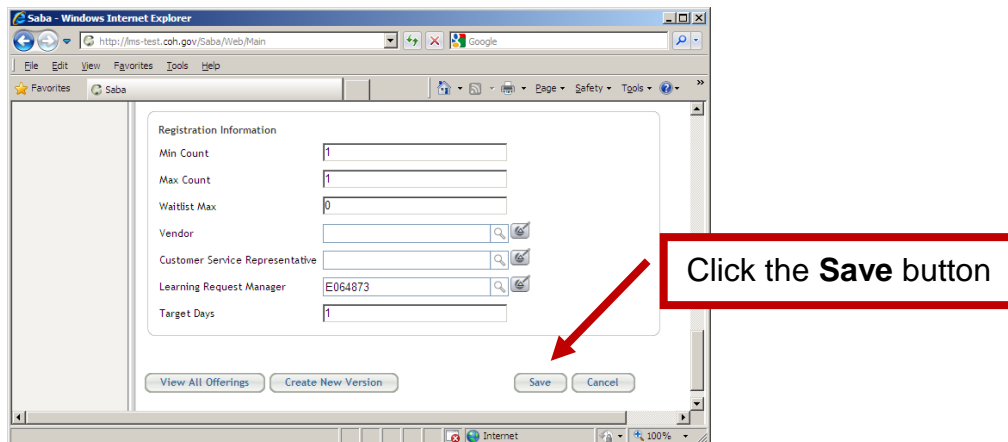
Learning Request Manager: E064873

Target Days: 1

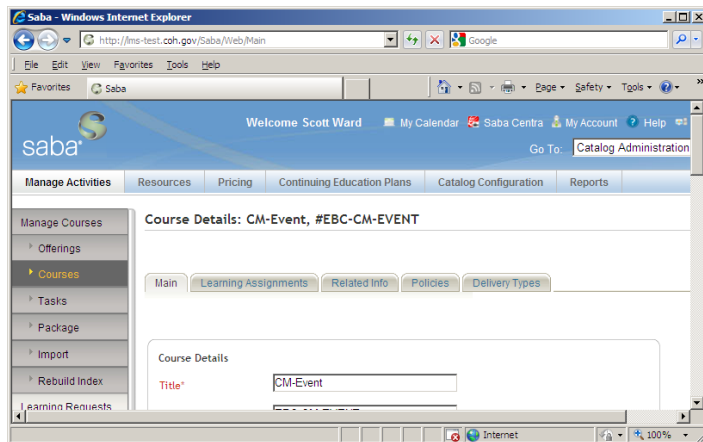
Buttons: View All Offerings, Create New Version, Save, Cancel

Type a 1 in the **Target Days** field

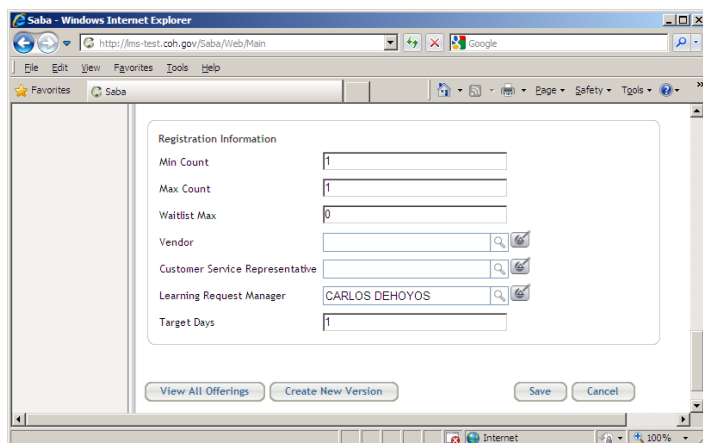
15. Click the **Save** button to save the course.



16. Notice that the top of the Course Details screen now shows the name and ID for the course, along with tabs for Learning Assignments, Related Info, Policies and Delivery Types.



17. At the bottom of the Course Details screen, notice that the Learning Request Manager's employee number has been replaced with a name. Also notice that there are now two new buttons: **View All Offerings** and **Create New Version**.



END OF PROCEDURE